

Racing Industry Recruitment, Skills and Retention Research 2023-24

Report: January/February 2024



RACING
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Research
Evaluation
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Racing Industry Recruitment, Skills and Retention Survey 2023-24

Executive Summary

Introduction and aims of the research

1. The Racing Foundation, in association with the British Horseracing Authority (BHA), National Association of Racing Staff (NARS) and National Trainers Federation (NTF), commissioned a survey of racing trainers and racing staff about recruitment, skills and retention in the racing industry.¹ This was the fourth survey in a series, with previous surveys in 2021 and 2018², which followed-up on a baseline survey conducted in Autumn 2016 to help measure the impact of the Racing Foundation's initial three-year £1 million proactive grant in the area of recruitment, skills and retention.
2. In addition, the research provides the racing industry with up-to-date and comprehensive quantitative information and business intelligence to help inform future industry initiatives. This includes informing the work of the industry's Independent People Board, and helping measure the effectiveness of associated initiatives.

Approach to the research

3. The research involved surveys of racing trainers and racing staff, with separate, but related, questionnaires developed for each audience.
4. **Racing trainers:** At the time of the research there were 542 licenced racing trainers. Between the end of November 2023 and mid-January 2024 a telephone survey of racing trainers was conducted. In total, 427 trainers responded to the survey, which represents a 79% response rate (the response rate was 79% in 2016, 78% in 2018 and 79% in 2021). As in previous years, this sample covers some 85% of all racing staff and 85% of all horses in training (because the surveys have a slight skew towards larger yards).
5. **Racing staff:** At the time of the research there were approximately 7,326 racing staff, including licenced jockeys, on the BHA's register with valid contact details. Racing staff were sent an e-mail/on-line survey initially at the end of November 2023, with multiple polite reminders to non-respondents. The original closing date was pre-Christmas 2023, with the survey extended into January 2024 to increase response. In total, 1,581 racing staff and jockeys responded to the survey, with a further 107 unable to respond due to an invalid email or postal address. This represents an adjusted response rate of 22% (the adjusted response rate was 21% in 2021, 17% in 2018 and 14% in 2016).³

¹ The research was conducted by independent research and evaluation organisation, Public Perspectives, which has some 15 years' experience working with the horse racing industry and conducted the previous versions of this survey.

² The planned survey for 2020 was postponed due to the Covid-19 pandemic. When comparing findings over time, the results of this research should be considered in the context of Brexit and the Covid-19 pandemic, which took place between the time of the 2018 survey and the 2021 survey.

³ Although this is a relatively low response rate, it is in line with expectations and exceeds past exercises with racing staff.

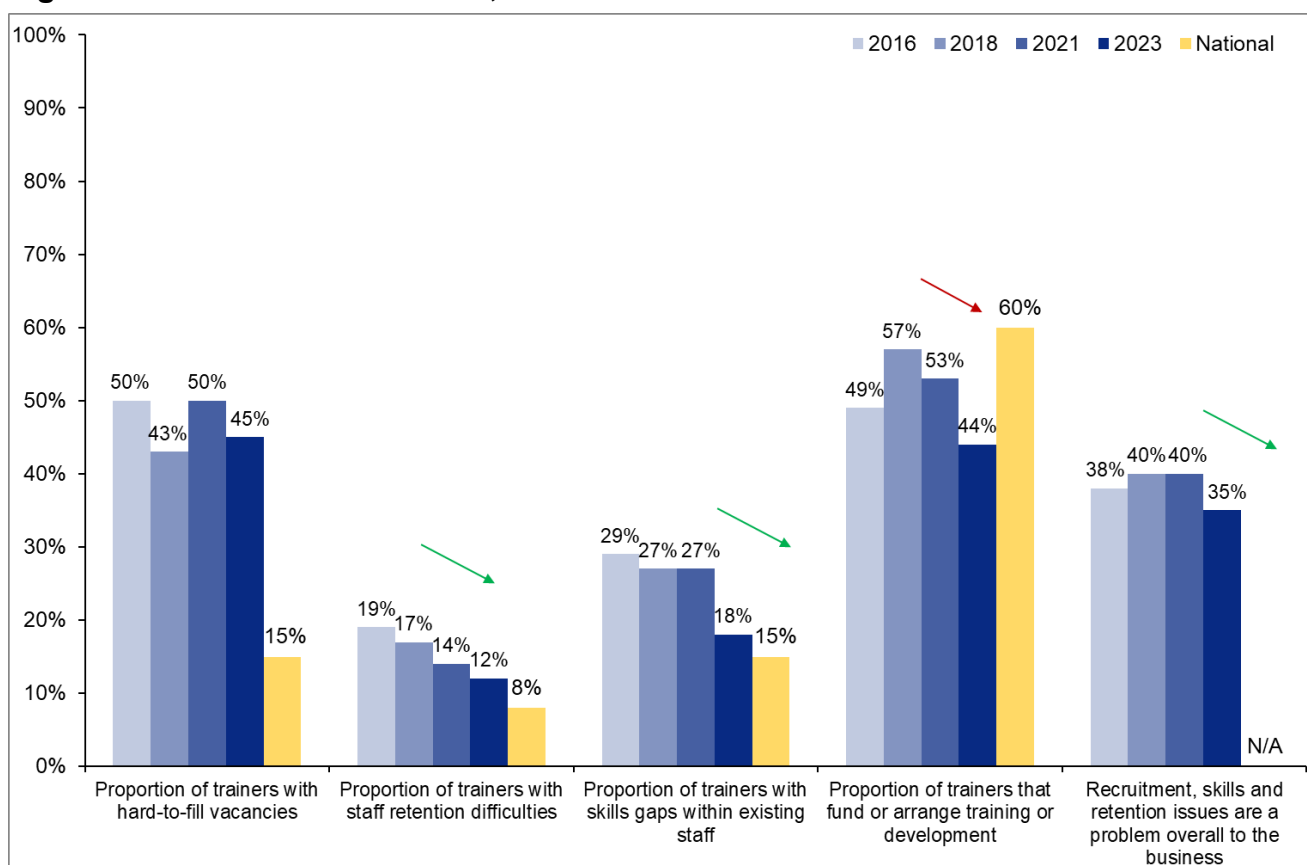
Key findings

6. By way of context, the research estimates that 26% of all permanent posts in racing yards require recruitment activity annually, due to staff turnover or growth (25% in 2021, 21% in 2018 and 24% in 2016) (this vacancy rate is a measure of recruitment demand and not of staff shortages). This equates to an estimated 1,775 jobs per annum that require recruitment.⁴ The research did not identify if these posts are successfully recruited or not, although there is evidence of hard-to-fill vacancies in the industry. The following graph (Figure 1) highlights the extent of recruitment, skills and retention issues from the perspective of trainers, compared over time and against national data in the wider economy (from the UK Employer Skills Survey 2022):
- 45% of trainers said they have hard-to-fill vacancies, compared with 50% in 2021, 43% in 2018 and 50% in 2016 (much higher than the national average at 15%). Once trainers without vacancies are removed, this figure increases to 68% of trainers with vacancies stating they had hard-to-fill vacancies in 2023, compared with 63% in 2021, 64% in 2018 and 62% in 2016. Trainers said the two main reasons for recruitment difficulties continue to be a lack of available staff in general and a lack of available sufficiently skilled staff, especially amongst work riders and also yard staff and to a lesser extent rider/grooms.
 - 12% of trainers said they have retention difficulties, continuing the positive downward trend compared with 14% in 2021, 17% in 2018, 19% in 2016 and 8% of businesses nationally in the wider economy (this is based on the 2017 UK Employer Skills Survey, because the question was not included in later versions). This equates to an estimated 23% of permanent racing staff jobs that are vacated by staff per annum (24% in 2021, 23% in 2018 and 28% in 2016). This retention rate is a measure of staff churn, some of these may change jobs within the same organisation and also not necessarily be leaving the industry, but instead moving to another trainer or organisation. The main retention challenges, cited by trainers and staff, continue to be with the work rider, yard staff and to a lesser extent rider/groom roles, due to unsociable hours, low pay and competition from other yards,
 - 18% of trainers said there are skills gaps amongst their existing workforce, which is a positive downward improvement compared to 27% in 2021 and 2018, and 29% in 2016 (15% of businesses nationally in the wider economy - a figure that has stayed steady over time). The main gaps continue to be around capability to ride and experience, especially amongst work riders and yard staff.
 - 44% of trainers funded or arranged training or development for their staff in the last 12 months, which is down compared with 53% in 2021, 57% in 2018, 49% in 2016 and 60% of businesses nationally in the wider economy (this has decreased from an average of 66% in previous national surveys of the wider economy). Lack of need continues to be mentioned by trainers as the main reason for not funding or organising training, even by some trainers that said they have skills gaps.
 - 35% of trainers said that recruitment, skills and retention issues are a problem for their business, 40% in 2021 and 2018, and 38% in 2016. Recruiting staff with the appropriate skills, and recruiting enough numbers of staff continue to be cited as the main problems.

⁴ Not all of these will be individual roles as it is possible that some roles will be vacant more than once per annum.

7. As in 2021, trainers were asked about the number of staff they are short to be able to operate at optimum levels i.e. staffing shortages. Similar to 2021, approximately two-thirds of trainers that have hard-to-fill vacancies said they are short of staff, which equates to about a third of all trainers. On average, of these trainers, they were approximately 10% to 20% short of staff to operate at optimum levels. **This equates to a staffing shortage of between approximately 450 and 500 staff across racing yards, which is similar to the estimate in 2021.**⁵
8. The size of yard continues to matter, with consistent differences over time. Larger yards (10+ staff) are more likely than smaller yards to experience hard-to-fill vacancies, retention difficulties, and skills gaps. Recruitment, skills and retention issues tend to be a greater problem for larger business. Smaller yards are less likely to fund, arrange or support training and development for their staff.

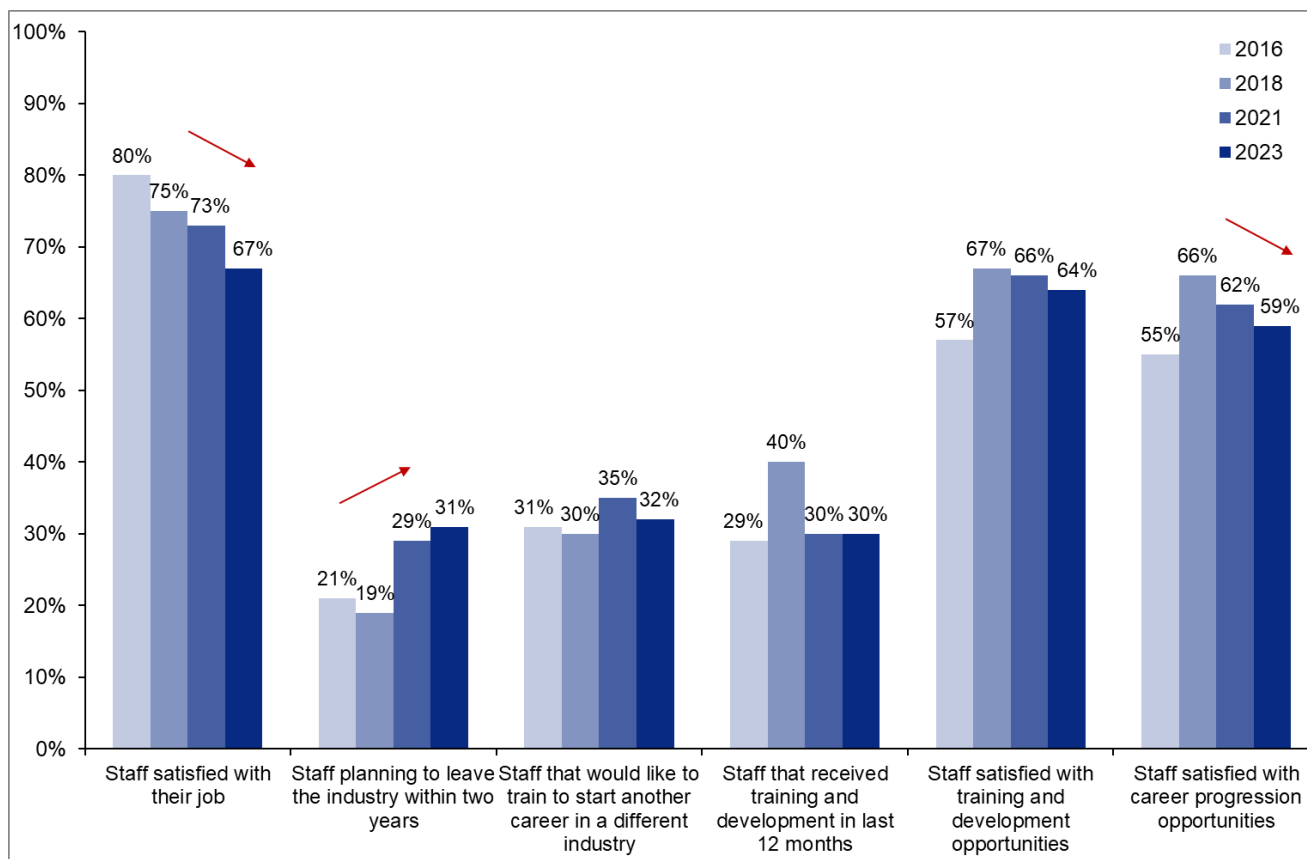
Figure 1: Trainers – recruitment, skills and retention issues



⁵ Note: Whilst the report authors are confident in the data and calculations behind this figure, it is based on modelling and estimated figures/approximations from respondents to the survey, which are then scaled-up to cover all racing yards.

9. The following graph highlights the extent of recruitment, skills and retention issues from the perspective of staff:
- 67% of staff are satisfied with their job, a downward trend compared with 73% in 2021, 75% in 2018 and 80% in 2016. The same reasons behind lack of job satisfaction persist since 2016 – mainly long hours and low pay (exacerbated by the cost of living, reduced prize money, and the current racing schedule), the physical demands of the job that get harder with age and worsened by staff shortages, all resulting in a relatively poor work-life balance. A lesser number also cite poor career opportunities. A small number mentioned perceived poor management and not being valued.
 - 31% are planning to leave the industry within two years (this is consistent with the 29% in 2021 and remains up from 19% in 2018 and 21% in 2016). The reasons staff cited for planning to leave the industry are similar to those cited since 2016 and for lack of job satisfaction – i.e. mainly working conditions and low pay, especially in light of workload, the racing schedule and reduced prize money, which means it can be difficult to find affordable housing and pay household bills, especially with the current cost of living. There was also some mention of lack of career progression opportunities and perceived poor management. In addition, a small number of staff cited illness/injury, which has worsened with age making it difficult to do a physical job. There was also some mention of the demanding nature of the job (long and unsociable hours) not being conducive to bringing up a young family. A small proportion (under 10% of those that plan to leave within two years) cited old age/retirement.
 - These adverse movements are reflected in the 32% of staff who would now like to train to start another career in a different industry (35% in 2021, 30% in 2018 and 31% in 2016).
 - 30% of staff received training and development in the last 12 months (same as in 2021 and down from 40% in 2018, but in line with 29% in 2016).
 - 64% are satisfied with training and development opportunities (consistent with the 66% in 2021 and 67% in 2018, and remains up on the 57% in 2016).
 - 59% are satisfied with career progression opportunities, which reflects a gradual downward trend compared with 62% in 2021, 66% in 2018 and 55% in 2016.
10. There are close relationships between these issues. For example, staff that are unsatisfied with training, development and career opportunities are less likely to be satisfied with their job and more likely to plan to leave the industry.

Figure 2: Staff – recruitment, skills and retention issues



Concluding points

11. Recruitment, skills and retention issues continue to negatively impact the industry, albeit with some improvements in staff retention and skills according to trainers at least. There remain notable difficulties around recruitment in the industry, with hard-to-fill vacancies a persistent problem, including in key roles such as work riders and in larger yards (with 10+ staff). These recruitment challenges are caused by a lack of staff in general and particularly lack of skilled staff. Similarly, whilst positively trainers report an improvement in skills gaps and an improved staff retention picture, there is a continued decrease in job satisfaction amongst racing staff and a notable proportion of staff that are considering leaving the industry, often citing working conditions, unsociable hours, low pay, workload and lack of career progression as issues. This presents a looming threat of the industry continuing to lose over time skilled and experienced staff that would exacerbate staffing problems.
12. These issues are worsened, according to staff and trainers, by issues in the wider economy such as the cost of living and changing working attitudes post-pandemic for more flexible and part-time working and improved work-life balance. In addition, specific industry issues add to the challenges such as low prize money and the racing schedule with Sunday and evening racing increasing workload pressures on an already stretched workforce, and implications for work-life balance especially affecting staff with families. The proposed immigration changes are also cited by some trainers as further challenges around sufficiently recruiting staff and resourcing their requirements.
13. The findings of this research indicate structural issues in the industry, with working conditions, pay and career progression opportunities, as well as immigration changes, affecting recruitment and retention. This provides further evidence in support of the key

challenges and focus areas identified by the [Horseracing Industry People Board](#) and will inform the industry people strategy expected to be launched in 2024.

14. The investment in recent years in training and development opportunities and welfare support in the industry has helped improve retention and skills and is generally positively perceived, although training uptake remains relatively low despite fairly high levels of awareness of the support available. There are opportunities to increase access to, and use of, training opportunities, such as rider coaching and work rider training to help address issues around lack of work riders in the industry.

Racing Industry Recruitment, Skills and Retention Survey 2023-24

Main Report

Section 1: Introduction

Introduction and aims of the research

1.1. The Racing Foundation, in association with the British Horseracing Authority (BHA), National Association of Racing Staff (NARS) and National Trainers Federation (NTF), commissioned a survey of racing trainers and racing staff about recruitment, skills and retention in the racing industry.⁶ This was the fourth survey in a series, with previous surveys in 2021 and 2018⁷, which followed-up on a baseline survey conducted in Autumn 2016 to help measure the impact of the Racing Foundation's initial three-year £1 million proactive grant in the area of recruitment, skills and retention. In addition, the research provides the racing industry with up-to-date and comprehensive quantitative information and business intelligence to help inform future industry initiatives. This includes informing the work of the industry's Independent People Board, and helping measure the effectiveness of associated initiatives.

Approach to the research

- 1.2. The research involved surveys of racing trainers and racing staff, with separate, but related, questionnaires developed for each audience.
- 1.3. **Racing trainers:** At the time of the research there were 542 licenced racing trainers. Between the end of November 2023 and mid-January 2024 a telephone survey of racing trainers was conducted. In total, 427 trainers responded to the survey, which represents a 79% response rate (the response rate was 79% in 2016, 78% in 2018 and 79% in 2021). As in previous years, this sample covers some 85% of all racing staff and 85% of all horses in training (because the surveys have a slight skew towards larger yards).
- 1.4. **Racing staff:** At the time of the research there were approximately 7,326 racing staff, including licenced jockeys, on the BHA's register with valid contact details. Racing staff were sent an e-mail/on-line survey initially at the end of November 2023, with multiple polite reminders to non-respondents. The original closing date was pre-Christmas 2023, with the survey extended into January 2024 to increase response. In total, 1,581 racing staff and jockeys responded to the survey, with a further 107 unable to respond due to an invalid email or postal address. This represents an adjusted response rate of 22% (the adjusted response rate was 21% in 2021, 17% in 2018 and 14% in 2016).⁸
- 1.5. With this number of respondents, the surveys provide robust data. The accuracy of the survey result is no worse than +/- 2.2% at a 95% confidence level for the trainer survey, and

⁶ The research was conducted by independent research and evaluation organisation, Public Perspectives, which has some 15 years' experience working with the horse racing industry and conducted the previous versions of this survey.

⁷ The planned survey for 2020 was postponed due to the Covid-19 pandemic. When comparing findings over time, the results of this research should be considered in the context of Brexit and the Covid-19 pandemic, which took place between the time of the 2018 survey and the 2021 survey.

⁸ Although this is a relatively low response rate, it is in line with expectations and exceeds past exercises with racing staff.

similarly +/- 2.2% at a 95% confidence level for staff.⁹ This means that we can be 95% confident that the 'real' result for any given question would be within 2.2 percentage points of those stated within the survey findings for trainers and staff respectively. This provides for robust data when the results are analysed at a headline level, sub-population level, and over time.

- 1.6. The above figures about sample accuracy are important because they help determine whether differences in results over time are statistically significant, once sample accuracy is taken into account (in general, differences of 4.5 percentage points or more are required for a difference to be statistically significant).
- 1.7. Respondents to the surveys provide a reasonable representation of all racing trainers and staff, with only a slight imbalance. The main imbalance for the trainers' survey is that there is a slight skew towards yards with 40+ horses in training away from yards with under 10 horses in training and this is also reflected in an over-representation of yards with larger prize earnings (this was also the case in previous surveys). For the staff survey, a higher proportion of women responded, as in previous years. Similarly, there is a slight over-representation of full-time employed staff over part-time staff (as in 2021), which may reflect the greater investment in the industry of the former, and therefore there was more motivation to respond to the survey. The survey results have been 're-weighted' to bring them in line with the profile of the wider racing trainer and staff populations to help ensure their accuracy and representativeness.
- 1.8. The following table shows the profile of respondents to the surveys by key demographics, and compared against the wider trainer and staff populations:

⁹ Sampling error, as the measure of survey accuracy is known, exists because even when surveying as robustly as has been the case with this research, only a proportion of the population has responded. Sampling error, therefore, is the measure of accuracy between the survey results and those that would have been obtained if all trainers and staff had responded, i.e. had a census been conducted.

Figure 1.1 Profile of respondents (prior to re-weighting)

Profile	Percentage of respondents	Percentage of all trainers/staff
Trainers		
No. of horses in training		
1-9	31%	40%
10-19	21%	22%
20-39	21%	20%
40+	27%	19%
Prize money		
Under £20,000	16%	22%
£20,000-£49,999	12%	15%
£50,000-£99,999	11%	13%
£100,000-£249,999	22%	20%
£250,000 and over	39%	29%
Geography		
South East	14%	16%
South West	20%	20%
East Anglia	19%	15%
Midlands	15%	15%
North	24%	24%
Scotland	4%	5%
Wales	4%	4%
Staff		
Gender		
Female	66%	50%
Male	34%	50%
Age		
16-24	23%	22%
25-34	26%	24%
35-44	19%	18%
45-54	14%	15%
55-64	14%	14%
65+	4%	6%
Employment status		
Employed full-time	64%	53%
Employed part-time	20%	28%
Self-employed	16%	19%

Reporting

1.9. The following report summarises the key findings from the surveys. Each relevant question has been analysed against key demographic and conceptual variables to identify any relevant patterns, trends, similarities or differences by different types of trainers and staff. Commentary is only provided where significant or meaningful findings are identified. The variables analysed include:

Trainer survey:

- Business size
- Number of horses trained
- Prize money earned
- Geography
- Flat or jump trainer, or both (determined by the proportion of prize draw money earned)
- Business performance

Staff survey:

- Gender
- Age
- Length of time in industry
- Length of time in job
- Employment status
- Job type
- Geography

1.10. Importantly, the results are analysed over time, comparing the 2023 results with those in 2021, 2018 and 2016.

1.11. In addition, where data exists, questions are compared against national data, primarily the UK Employer Skills Survey 2022 – a telephone survey of some 90,000 employers conducted nationally by the UK Government.

1.12. The questionnaires contain satisfaction and agree/disagree questions on a scale of 1-10. This approach was taken as it allows for a greater degree of opinion to be provided, which offers more robust opportunities to monitor change in perceptions over time. As per convention, these questions are analysed by grouping responses. For example, responses 1-4 are combined to form 'disagree', 5-6 to form 'neutral' and 7-10 to form 'agree'.

1.13. The remainder of this report is divided into the following sections:

- Section 2: Labour force statistics, business performance and workforce demand
- Section 3: Recruitment
- Section 4: Retention
- Section 5: Skills, training and support
- Section 6: Concluding points

Section 2: Labour force statistics, business performance and workforce demand

Introduction

2.1. This section presents findings about the size of training yards operating in the racing industry, business performance and workforce demand.

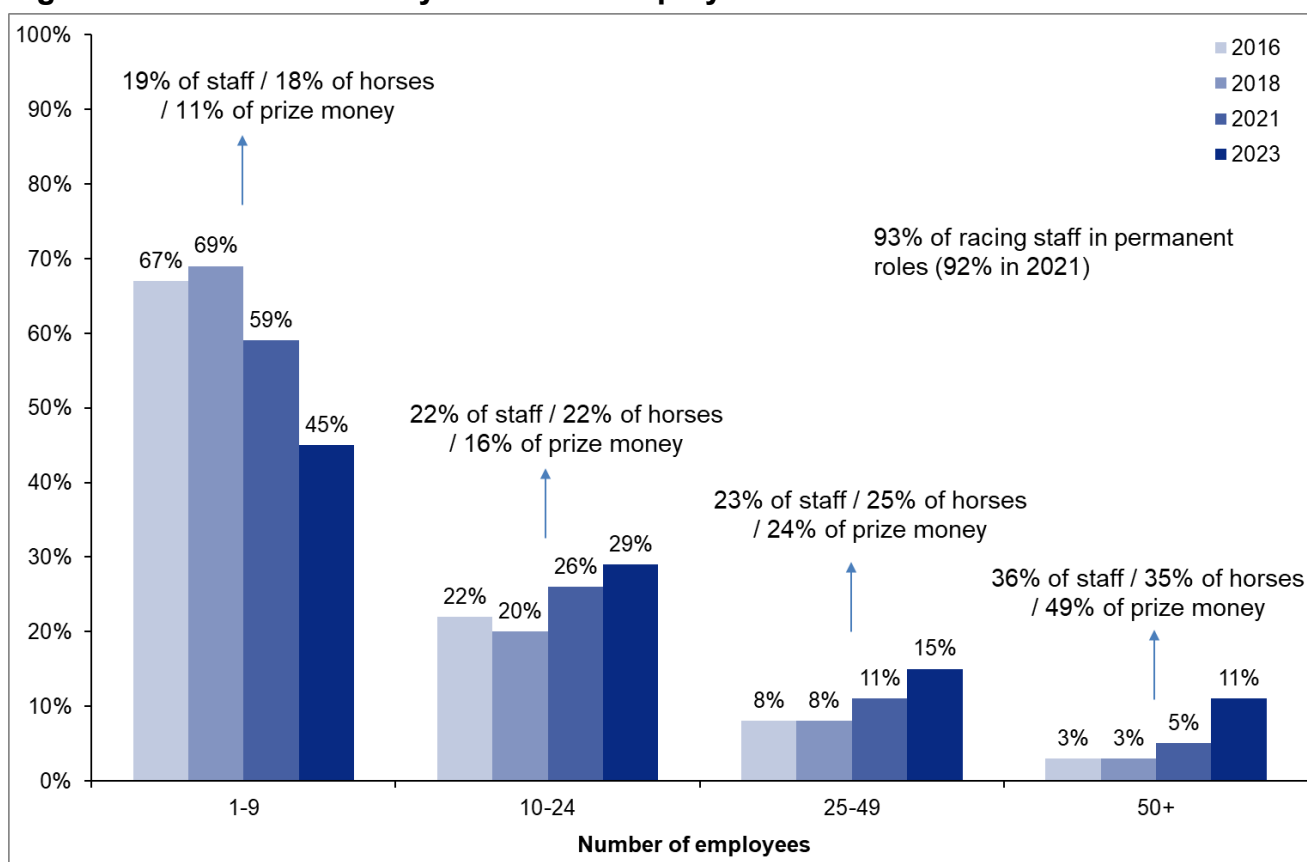
Labour force statistics

The structure of the labour force continues to shift away from smaller yards to larger yards, with the majority of staff, horses and prize money concentrated in the increasing proportion of yards with 25 or more staff

2.2. 45% of trainers have 1-9 staff (down from 69% in 2018 and 59% in 2021), accounting for 19% of racing staff (20% in 2021), 18% of horses in training (23% in 2021) and 11% of prize money earned (also 11% in 2021). 29% of trainers (20% in 2018 and 26% in 2021) have 10-24 staff, accounting for 22% of racing staff (29% in 2021), 22% of horses (31% in 2021) and 16% of prize money (26% in 2021). The remaining 26% of trainers have 25+ staff (11% in 2018 and 16% in 2021), accounting for 59% of racing staff (50% in 2021), 60% of horses (46% in 2021) and 73% of prize money (63% in 2021).

2.3. Similar to previous surveys, 93% of racing staff are in permanent roles, with the remainder in temporary (c2%), seasonal (c2%) or casual roles (c4%) (93% in 2016 and 2018, and 92% in 2021).

Figure 2.1: Business size by number of employees



Number of respondents: 427 trainers.

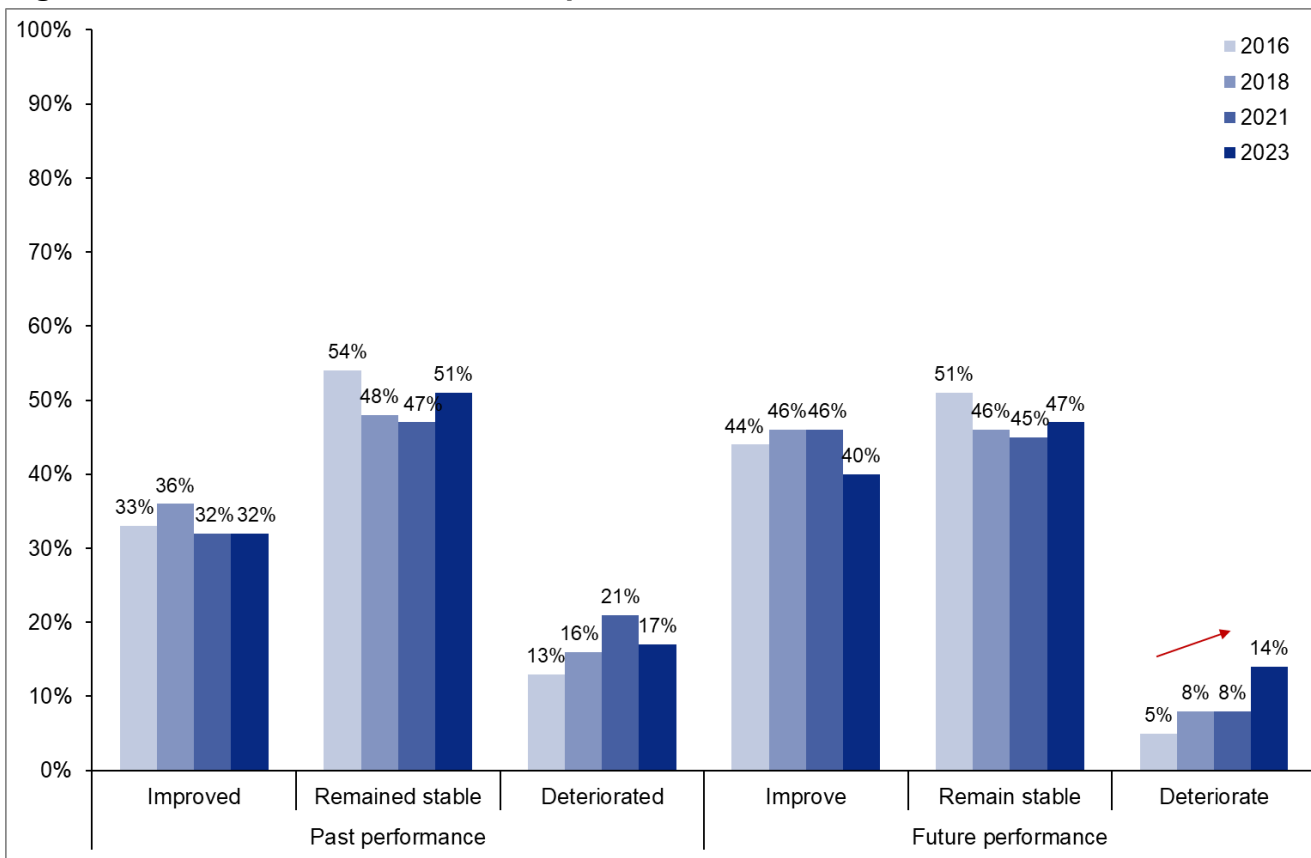
Question asked: Including you and any working proprietors/owners, how many people are employed by your business during your peak season?

Business performance

A third of trainers reported improved business performance, similar to the past, although they are slightly less optimistic for the future than in the past with two-fifths expecting performance to improve in the next year and 1-in-7 expecting performance to decrease

- 2.4. 32% of trainers said their business performance improved over the past 12 months (same as in 2021), 51% said it remained stable and 17% said it deteriorated (similar to the 16% in 2018, pre-pandemic). Of the 21% of trainers that said performance deteriorated, 37% expect it will improve, a further 39% expect it will remain stable and 24% expect it will deteriorate further in the next 12 months.
- 2.5. 40% of trainers expect performance will improve over the next 12 months (down from 46% in 2021 and 2018), 47% said it will remain stable and 14% said it will deteriorate (down from 18% in 2021 and 2018).
- 2.6. As in the past, trainers with 1-9 staff are less likely than larger yards to state that business has improved (21% compared with 40% of larger yards) and more likely to state it has deteriorated (24% compared with 11% of larger yards). Trainers with 1-9 staff also tend to be slightly less optimistic about the future, with 30% expecting performance to improve compared with 47% of larger yards.
- 2.7. Nationally, whilst not an exact comparison, 15% of businesses said their performance had improved, 55% stayed the same, 17% decreased and 12% not sure compared to the same month a year ago (ONS Business Survey, November 2023). In terms of the future, 21% expect their performance to improve over the next 12 months, 49% stay the same, 10% decrease and 20% are not sure (ONS Business Survey, November 2023).

Figure 2.2: Past and future business performance



Number of respondents: 427 trainers.

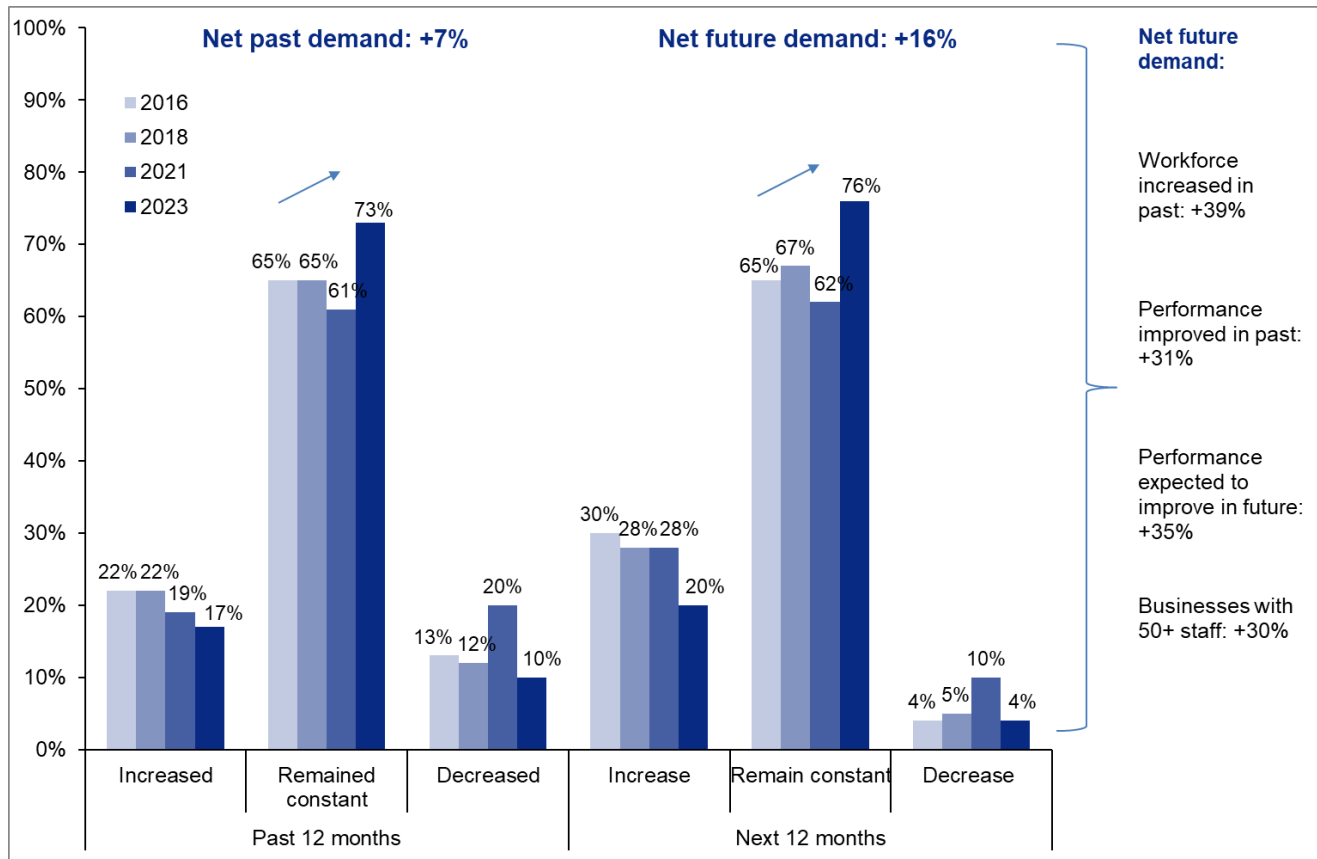
Questions asked: Would you say that overall, your business performance in the past 12 months has improved, remained stable or deteriorated? / Over the next 12 months do you expect your business performance to generally improve, remain stable, or deteriorate?

Workforce demand

Trainers are most likely to state that their workforce remained stable and will do so in the future, although more trainers said their workforce has and/or will increase than said it has and/or will decrease

- 2.8. 17% of trainers said that their workforce increased over the past 12 months, while 10% reported it decreased. This results in net past workforce demand (i.e. the difference between the increase and decrease in workforce) of +1% (in 2018 it was +10% and in 2021 it was -1%, potentially reflecting the impact of the pandemic at the time).
- 2.9. There is understandably a relationship between business performance and workforce demand. Trainers that said their performance had improved over the past 12 months had a higher net past workforce demand of +35%, compared with -5% of other trainers. Larger yards are also more likely to have a net increase in their workforce, for example, yards with 1 to 24 staff had a net increase in their workforce of +4% compared to +17% of larger yards.
- 2.10. 20% of trainers expect their workforce to increase in the next 12 months, while 4% expect it to decrease, resulting in a net future workforce demand of +16% (+23% in 2018 and +18% in 2021). The trainers mainly said the reason for growth was due to business growth/more horses, although a smaller proportion also said it is to bring the staffing up to optimum levels, reduce pressure on existing staff and bring in more experienced and/or skilled staff.
- 2.11. Similar to the past, net future workforce demand is greatest amongst trainers that increased their workforce in the past 12 months (+39%), trainers that reported improved performance in the past (+31%) and trainers that expect improved performance in the future (+35%), which highlights the close relationship between business growth and continued demand for staffing. Larger businesses are more likely to have a higher future demand for staff – for example, trainers with 50+ staff have a net future workforce demand of +30%.
- 2.12. Positively, 40% of trainers who said their workforce decreased in past, expect it to increase in future and only 17% said it will decrease further, suggesting signs of recovery.

Figure 2.3: Workforce demand



Number of respondents: 427 trainers. Questions asked: On average, over the past 12 months, has your workforce increased, remained constant or decreased? / And over the next 12 months, on average, do you expect your workforce to increase, remain constant or decrease?

Section 3: Recruitment

Introduction

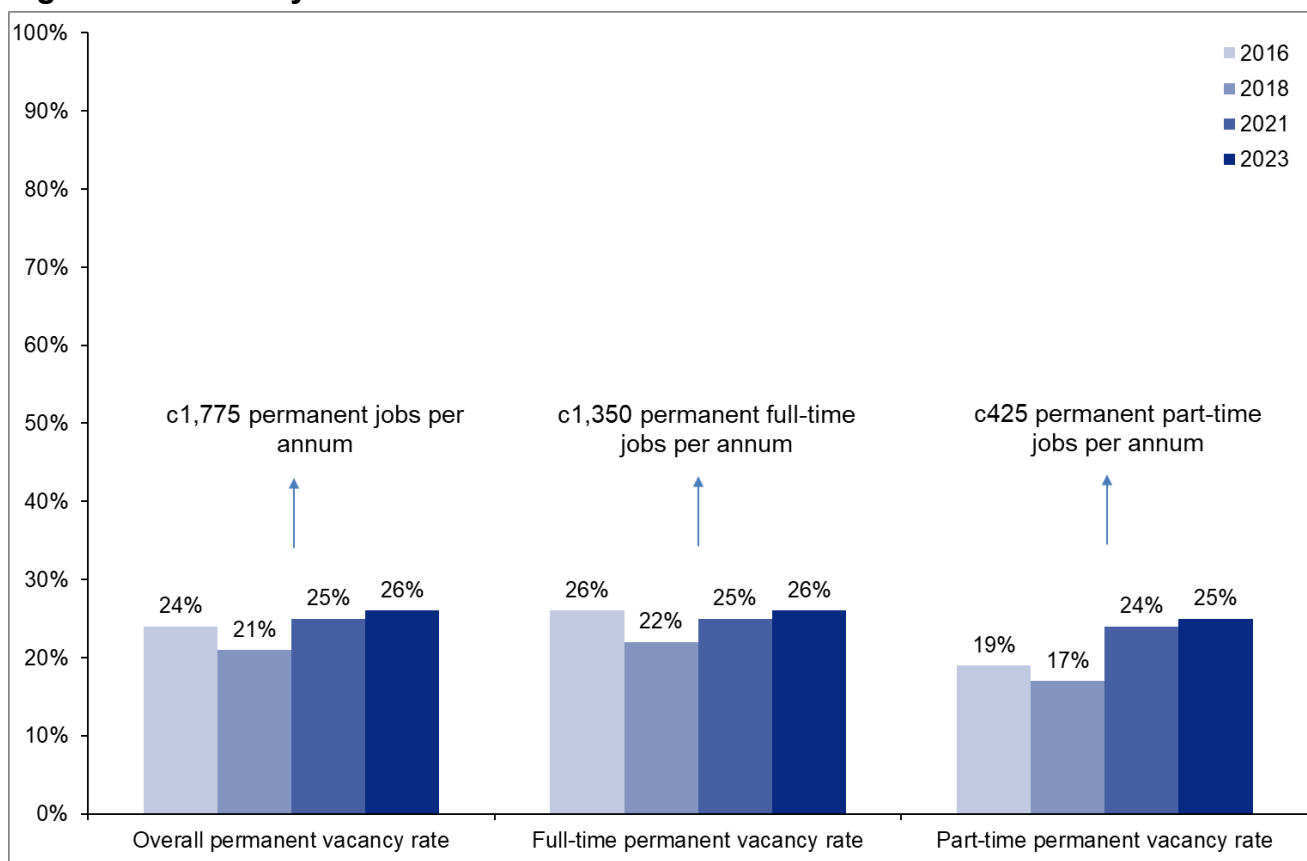
3.1. This section presents findings about recruitment, including information about vacancy rates, hard-to-fill vacancies, the types of trainers and occupations most affected, and the reasons for recruitment difficulties.

Vacancy rates

A quarter of permanent racing staff jobs are vacant annually, which is fairly stable since 2016

- 3.2. Overall, there is an estimated annual vacancy rate of 26% of all permanent racing staff jobs (24% in 2016, 21% in 2018 and 25% in 2021) (i.e. the number of vacancies per annum as a proportion of the total number of permanent jobs – this is essentially a measure of recruitment demand and is not a measure of staff shortages). These are permanent posts in racing yards that require recruitment activity annually, due to staff moving jobs within a yard, moving to another yard, leaving the industry and/or business growth creating new roles. This figure is fairly stable over time.
- 3.3. A vacancy rate of 26% equates to approximately 1,775 jobs per annum that require recruitment, including some 1,350 that are full-time and 425 that are part-time roles. Not all of these will be individual roles as it is possible that some roles will be vacant more than once per annum.
- 3.4. Nationally, the latest employer skills survey shows that at the time of interviewing 23% of businesses had at least one vacancy (up from 20% in 2017) (Employer Skills Survey, 2022). Please note this is not a direct comparison as it asks for current vacancies, rather than over the past 12 months, but suggests that the level of vacancies in the racing industry are broadly in-line with those nationally.
- 3.5. 85% of businesses with 25 or more staff had vacancies requiring recruitment, 79% of businesses with 10-24 employees had vacancies and 55% of businesses with 1-9 employees had vacancies requiring recruitment at some point in the past year (similar results to previous surveys, although the proportion of small yards with vacancies has decreased back to 2018 levels - in 2021 68% of yards with 1-9 staff had vacancies and in 2018 it was 57% of yards with 1 to 9 staff that had vacancies). Overall, 68% of trainers had vacancies that needed recruiting over the past 12 months (77% in 2021).

Figure 3.1: Vacancy rates



Number of respondents: 427 trainers.

Questions asked: Overall, how many full-time and part-time vacancies have you had in the last 12 months? / And roughly, in the last 12 months, how many vacancies have been permanent, temporary, seasonal and casual?

- 3.6. Trainers with vacancies tended to cite several recruitment methods, similar to the previous survey, including (in order of being cited): word of mouth (especially smaller yards), social media, Careersinracing.com (especially larger yards), and via the racing schools (especially larger yards).
- 3.7. For the first time, trainers were asked about recruitment directly from the racing schools – 36% said they recruit staff from the racing schools. This is much more common amongst larger yards – 12% of trainers with 1-9 staff recruit from the racing schools compared with 43% of trainers with 10-24 staff, 65% with 25 to 49 staff and 81% with 50+ staff.
- 3.8. Of those that recruit staff directly from the racing schools, 21% rated them as very good, 27% as good, 32% as average, 14% as poor and 5% as very poor.
- 3.9. In the staff survey, a question was asked regarding routes into the industry, with results as follows:
 - 46% worked with ponies and/or horses outside of the racing industry e.g. Livery Yard, racing stable, other equestrian sport before entering the industry
 - 28% entered the industry after studying at one of the racing schools
 - 21% were members of the Pony Club before entering the industry
 - 15% were involved in farming before entering the industry
 - 11% have also worked in the thoroughbred breeding industry
 - 8% entered the industry after studying at an equine college
 - 6% participated in pony racing before entering the industry

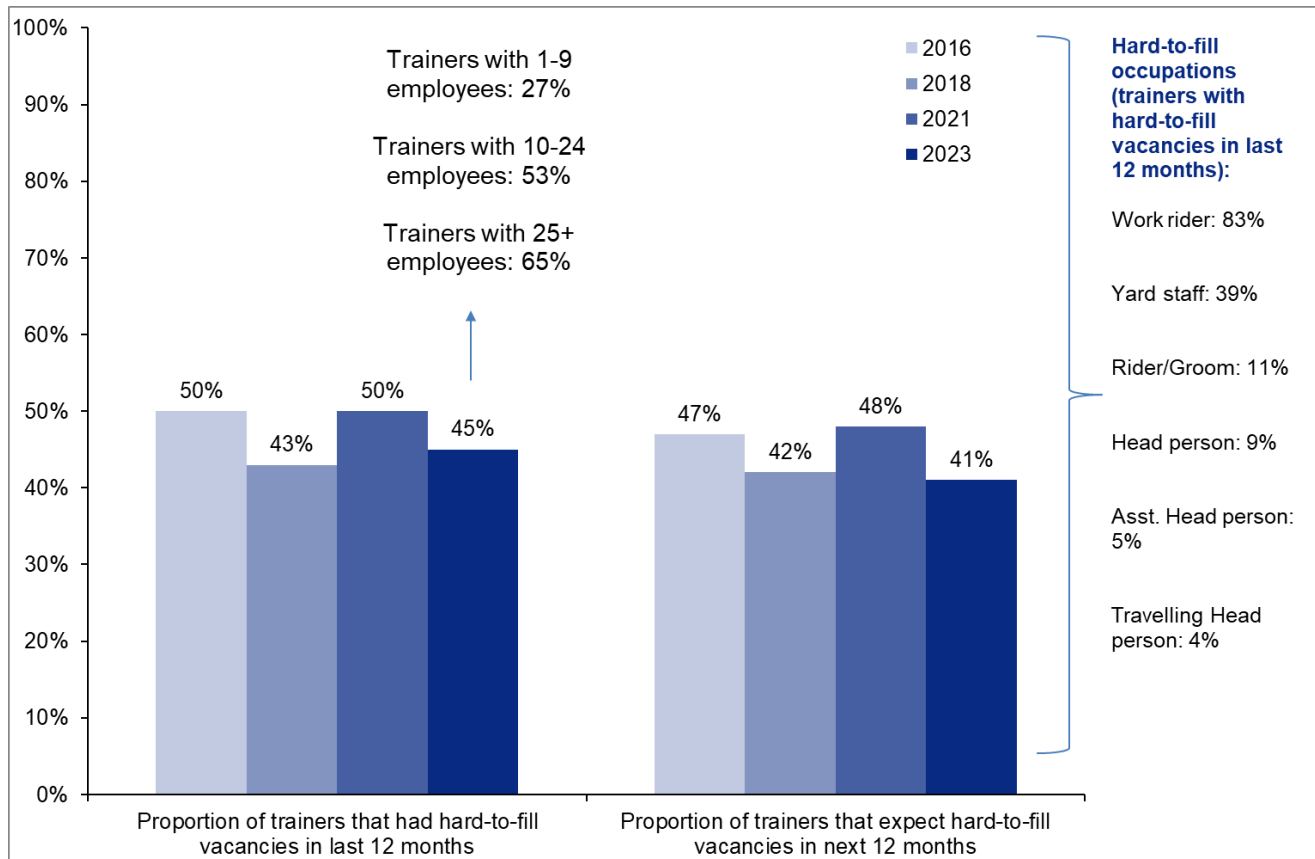
Hard-to-fill vacancies

The proportion of hard-to-fill vacancies is broadly similar over time, with issues most experienced in larger yards and in work rider roles

- 3.10. 45% of trainers said they had hard-to-fill vacancies in the last 12 months, compared to 50% in 2021. Once trainers without vacancies are removed, this figure increases to 68% of trainers with vacancies stating they had hard-to-fill vacancies in 2023, compared with 63% in 2021, 64% in 2018 and 62% in 2016.
- 3.11. Nationally, 15% of businesses overall said they had at least one hard-to-fill vacancy (representing 57% of all vacancies), up from 8% in 2017 (Employer Skills Survey, 2022).
- 3.12. As in previous surveys, larger yards are more likely to say they had hard-to-fill vacancies. For example, 27% of trainers with 1-9 employees said they had hard-to-fill vacancies, compared with 53% with 10-24 employees and 65% with 25+ employees. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 3.13. 41% of trainers expect to have hard-to-fill vacancies in the next 12 months, compared with 48% in 2021, 42% in 2018 and 47% in 2016 (noting that less trainers said they intend to recruit staff in the next 12 months, which will mean less experiencing recruitment difficulties). 76% of trainers that had hard-to-fill vacancies in the past also expect to have hard-to-fill vacancies in the future (77% in 2021 and 2018), and 15% that did not have any hard-to-fill vacancies in the past expect to have them in the future (22% in 2021 and 18% in 2018).
- 3.14. The occupations which were most commonly cited as being hard to fill are consistent with previous surveys, albeit with some variations, and continue to be: work riders (cited by 83% of trainers that said they had hard-to-fill vacancies – 65% in 2021, 64% in 2018 and 47% in 2016), yard staff (39% in 2021, 27% in 2021, 34% in 2018 and 33% in 2016), Rider/Groom (11% in 2023, 35% in 2021, 25% in 2018 and 48% in 2016), and head person (9% in 2023 and 2021, 10% in 2018 and 8% in 2016). These are also generally the expected roles that will be difficult to fill over the next 12 months.
- 3.15. As in 2021, trainers were asked about the number of staff they are short to be able to operate at optimum levels i.e. staffing shortages. Similar to 2021, approximately two-thirds of trainers that have hard-to-fill vacancies said they are short of staff, which equates to about a third of all trainers. On average, of these trainers, they were approximately 10% to 20% short of staff to operate at optimum levels. **This equates to a staffing shortage of between approximately 450 and 500 staff across racing yards, which is similar to the estimate in 2021.**¹⁰

¹⁰ Note: Whilst the report authors are confident in the data and calculations behind this figure, it is based on modelling and estimated figures/approximations from respondents to the survey, which are then scaled up to cover all racing yards.

Figure 3.2: Hard-to-fill vacancies



Number of respondents: 427 trainers.

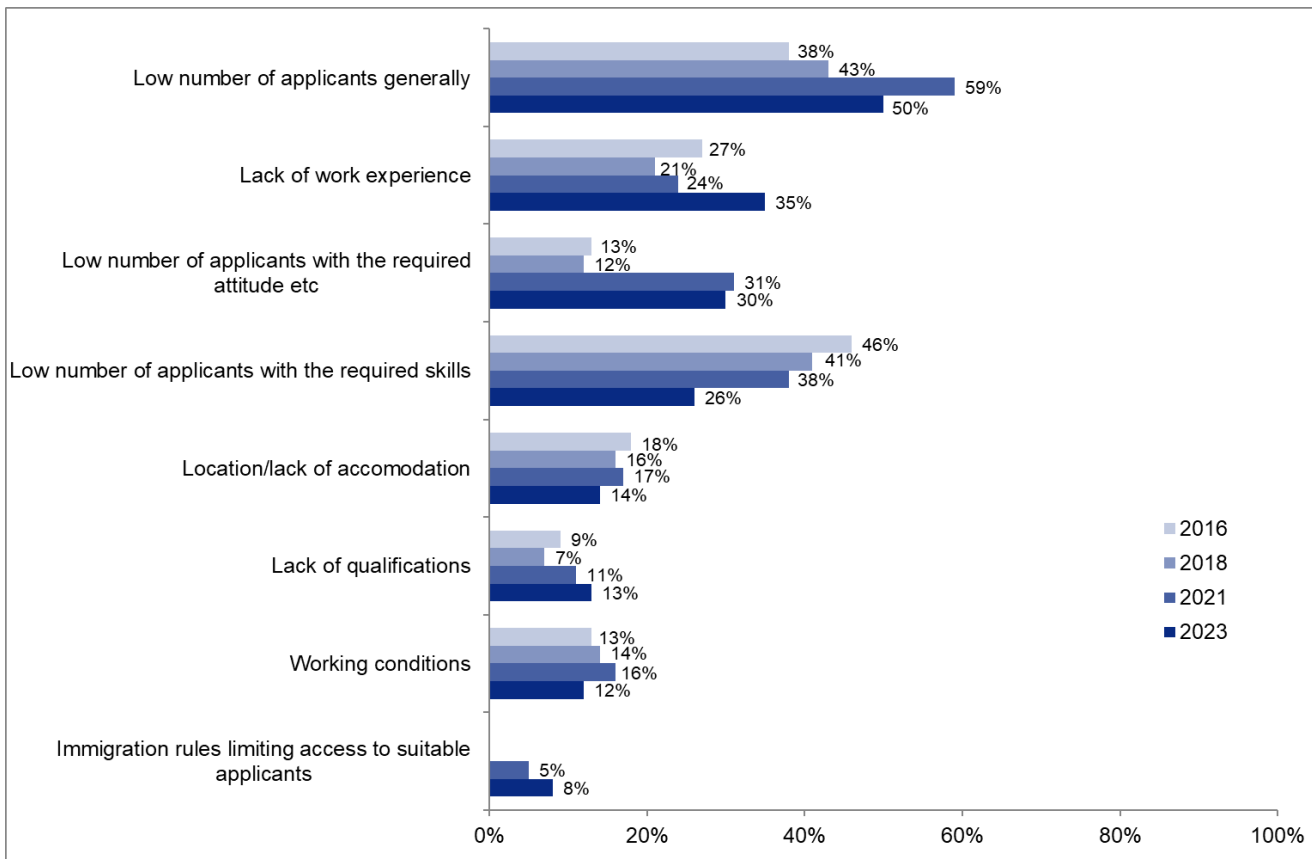
Questions asked: Have you had any vacancies in the last 12 months that you have found hard to fill? / Roughly, what proportion of your vacancies have been hard to fill? / Which specific occupations have you found hard to fill? / Do you expect to have any vacancies that will be hard to fill in the next 12 months? If hard to fill vacancies, how many staff, if at all, would you say you are short to be operating at optimum levels?

Reasons for hard-to-fill vacancies

The number of applicants generally, and the number with the required skills, continue to be cited as the main reasons for hard-to-fill vacancies

- 3.16. The reasons for hard-to-fill vacancies remain broadly consistent over time, with the low number of applicants remaining the most commonly cited reason (cited by 50% of trainers with hard-to-fill vacancies, slightly less than the 59% of trainers in 2021, but up from 43% in 2018). In the open-ended comments, this point is elaborated with some yards stating high levels of competition amongst yards for a limited pool of good quality staff.
- 3.17. Other reasons cited include lack of work experience (35% up from 24% in 2021), low number of applicants with the required attitude (30%, similar to 31% in 2021) and the low number of applicants with the required skills (26% down from 38% in 2021).
- 3.18. In addition, other factors, such as location/lack of accommodation (14%), working conditions such as low pay and long working hours (12%), lack of qualifications (13%) and immigration issues (8%) remain prevalent.
- 3.19. The reasons cited are broadly consistent across different types of trainers/different demographics.

Figure 3.3: Reasons for hard-to-fill vacancies



Number of respondents: 289 trainers (only trainers that said they had hard-to-fill vacancies).

Note: Respondents could select more than one answer.

Question asked: What have been the main causes of having hard-to-fill vacancies?

Section 4: Retention

Introduction

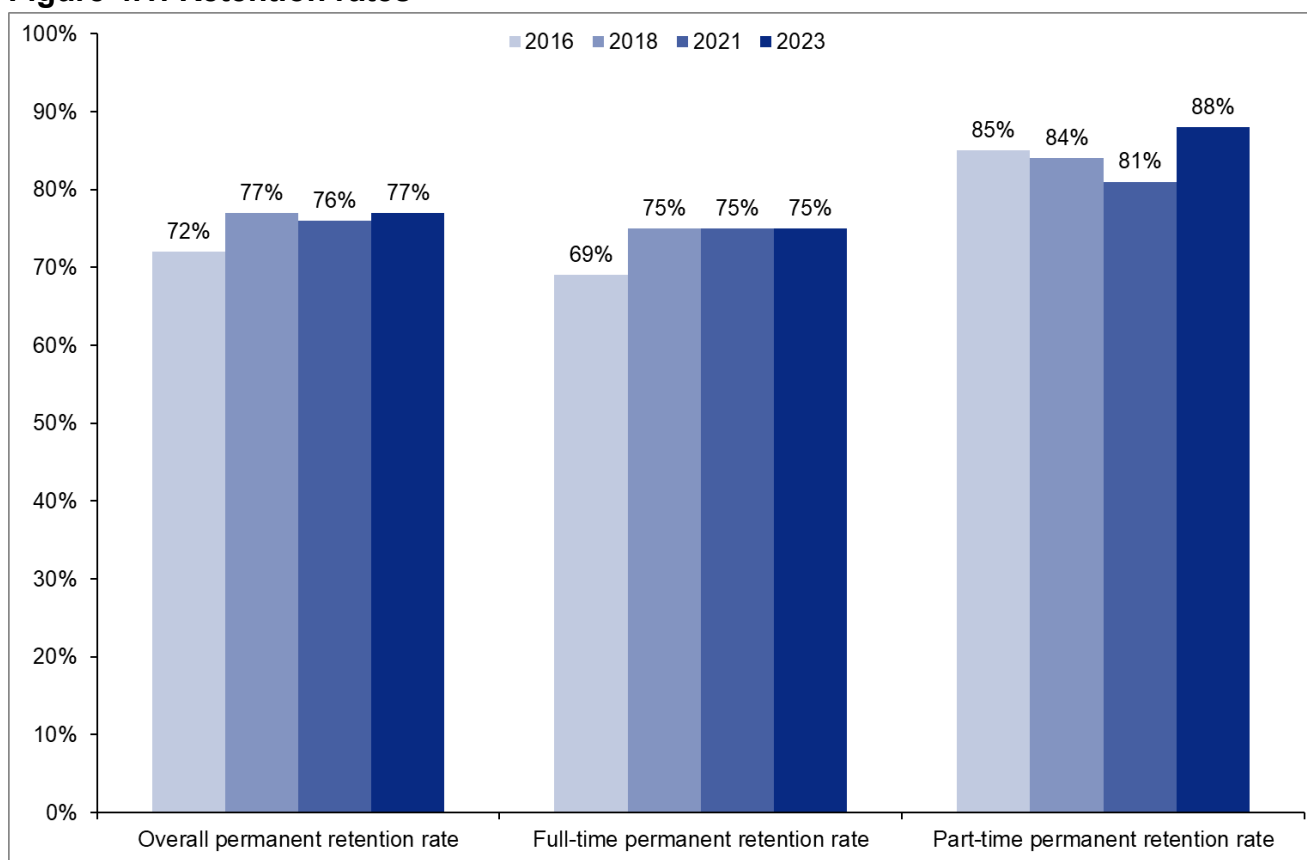
4.1. This section presents findings about staff retention from the perspective of trainers and staff, including information about retention rates, retention difficulties, the types of trainers and occupations most affected, and the reasons for retention difficulties.

Retention rates

Under a quarter of staff leave their job roles per annum, broadly maintaining the slight improvement since 2016

- 4.2. Overall, there is an estimated retention rate of 77% of all permanent racing staff in their job roles per annum. In other words, some 23% of racing staff leave their jobs each year (some of these may change jobs within the same organisation). Racing staff in full-time roles are less likely to stay in their jobs (75%), compared with part-time staff (88%). This so-called retention rate is a measure of staff churn.
- 4.3. The retention rate broadly maintains the slight improvement over time, from 72% in 2016 to 77% in 2023, while the rate for full-time staff remains consistent between 2018 and 2023 and the rate for part-time staff has improved since 2021.
- 4.4. Smaller yards experience slightly greater retention problems, with retention rates in yards of 1 to 24 staff of 74% compared to 80% in yards of 25+ staff. This suggests that larger yards may have better policies, systems and cultures in place to support staff retention, as well as offer more job progression. This said, it is worth noting that the rate for smaller yards of 1 to 9 staff has improved from 67% in 2021 to 75% in 2023.

Figure 4.1: Retention rates



Number of respondents: 427 trainers.

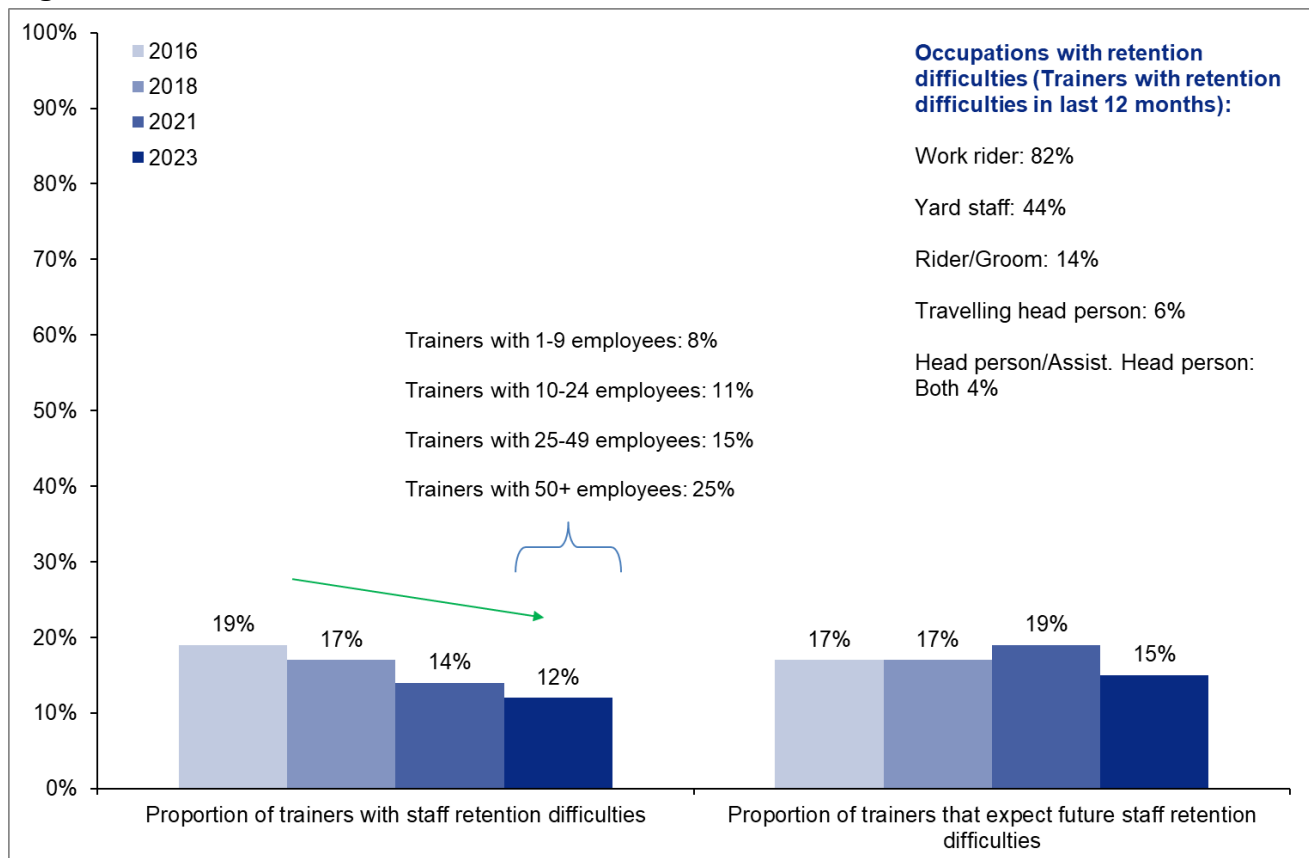
Question asked: Overall, how many permanent full-time and part-time staff have left their roles in the last 12 months?

Retention difficulties

The retention picture continues on a positive downward trend with less trainers experiencing retention difficulties, although issues still exist in key roles such as work riders

- 4.5. 12% of trainers said they had difficulties retaining staff in the last 12 months. This maintains the gradual improvement over time, with results of 14% in 2021, 17% in 2018 and 19% in 2016. The national figure, based on the UK Employer Skills Survey 2015, is 15% (this has not been asked since).
- 4.6. 12% of trainers face a double problem of hard-to-fill vacancies and retention difficulties (11% in 2021, 14% in 2018 and 17% in 2016).
- 4.7. As in previous surveys, larger yards are more likely to say they have retention difficulties, which is essentially a product of having more staff and therefore more staff likely to change roles or move organisations. For example, 8% of trainers with 1-9 employees said they had retention difficulties, compared with 11% with 10-24 staff, 15% with 25-49 staff and 25% with 50+ staff. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 4.8. 15% of trainers expect to have retention difficulties in the next 12 months, compared with 19% in 2021, 17% in 2018 and 2016. Similar to previous surveys, 83% of trainers that had retention difficulties in the past also expect to have difficulties in the future (67% in 2021), and 6% that did not have any difficulties in the past expect to have them in the future (11% in 2021), highlighting the enduring nature of retention challenges for some trainers.
- 4.9. The occupations that were most commonly cited as having retention difficulties continue to be work riders (cited by 82% of trainers with retention difficulties in 2023, up from 46% in 2021, 59% in 2018 and 40% in 2016), yard staff (44%, up from 32% in 2021 and similar to 43% in 2018 and 51% in 2016), and Rider/Groom (14%, down from 29% in 2021, 39% in 2018 and 54% in 2016). These are also the similar roles that trainers expect to have retention difficulties with in the future.

Figure 4.2: Retention difficulties



Number of respondents: 427 trainers.

Questions asked: In the last 12 months, have you had any difficulties retaining staff? (by this we mean staff that have left their roles for reasons other than normal, such as retirement or leaving a temporary role) / Roughly, what proportion of your staff have been difficult to retain? / Which specific occupations have you had difficulties retaining staff? / Do you expect to have any staff retention problems in the next 12 months?

Reasons for retention difficulties

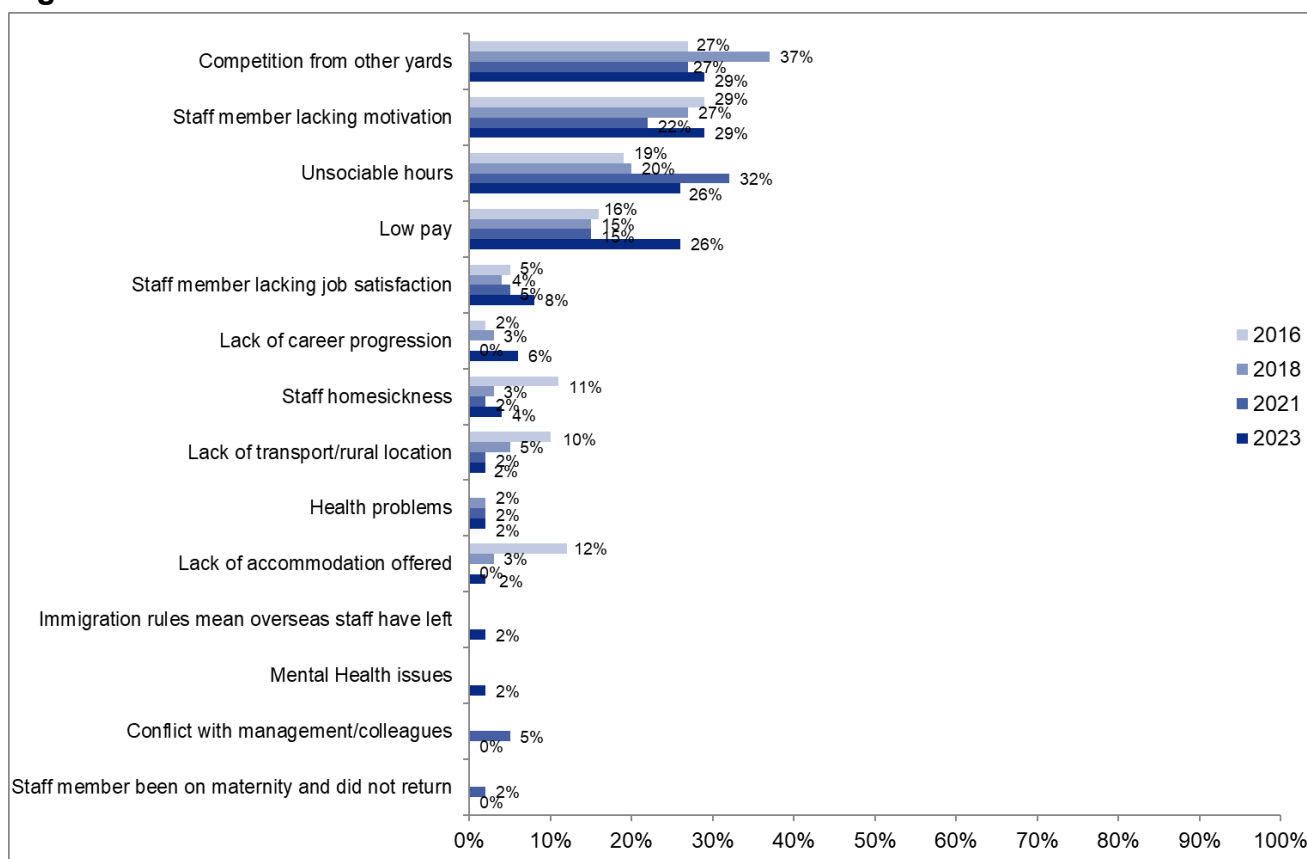
Competition from other yards for limited staff, staff lack motivation/commitment to the job, and working conditions (hours and pay) continued to be the most cited reasons for retention difficulties

4.10. Competition from other yards (cited by 29% of trainers with retention difficulties), staff member lacking motivation/commitment to the job (29%), unsociable hours (26%) and low pay (26%) remain the main reasons for retention difficulties.¹¹

4.11. 2% stated immigration rules and 2% stated mental health issues.

4.12. There was not mention of lack of suitable childcare provision or maternity issues leading to retention difficulties.

Figure 4.3: Reasons for retention difficulties



Number of respondents: 51 trainers (only respondents that said they had retention difficulties).

Note: Respondents could select more than one answer.

Question asked: What have been the main reasons why you have found it difficult to retain staff?

¹¹ Although the percentages vary, the broad order of reasons for retention difficulties remains similar over the years. The percentage differences are minimal, once sampling accuracy is taken into account due to the low number of respondents to this question.

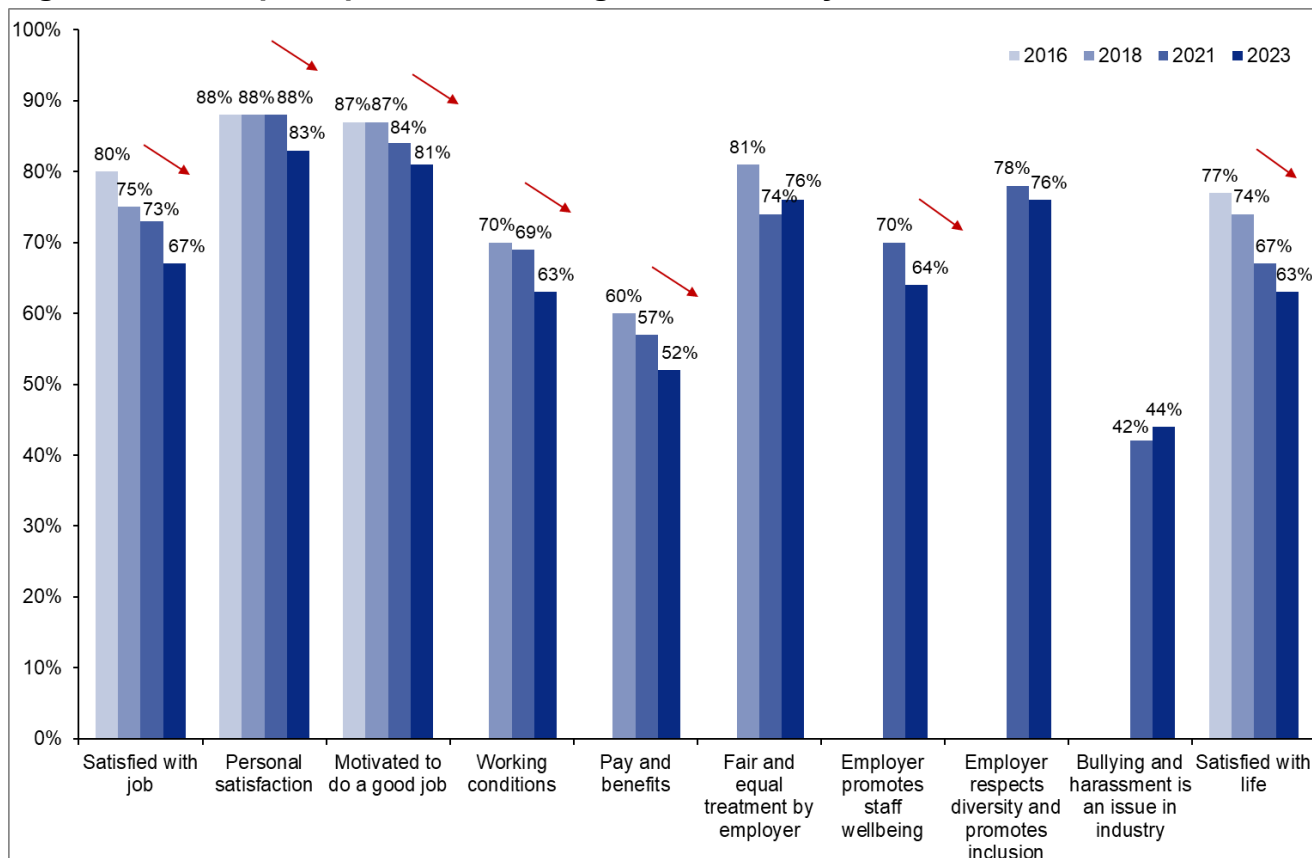
Staff and retention

A decreasing proportion of staff are satisfied with their jobs (and other indicators), with about two-thirds of staff satisfied, which effects motivation and emotional wellbeing, with working conditions, pay, management and wellbeing drivers of job satisfaction

4.13. Staff said the following about job satisfaction:

- **Job satisfaction:** 67% of racing staff are satisfied (compared with 73% in 2021, 75% in 2018 and 80% in 2016). As in the past, the main reasons staff cited for being satisfied were a love of, or passion for, riding and working with horses, as well as the camaraderie of working in some yards. The same reasons behind lack of job satisfaction persist since 2016 – mainly long hours and low pay (exacerbated by the cost of living, reduced prize money, and the current racing schedule), the physical demands of the job that get harder with age and worsened by staff shortages, all resulting in a relatively poor work-life balance. A lesser number also cite poor career opportunities. A small number mentioned perceived poor management and not being valued.
- **Personal satisfaction:** 83% of racing staff gain personal satisfaction from their job (also 88% in previous years). As in previous surveys, staff that are not satisfied with their job are less likely to get personal satisfaction from their work.
- **Motivation:** 81% of racing staff are motivated to do a good job (84% in 2021, 87% in 2016 and 2018). Staff that are not satisfied with their job are less likely to be motivated (55% motivated).
- **Working conditions:** 63% of racing staff are satisfied with their working conditions (69% in 2021 and 70% in 2018). Staff that are not satisfied with their job are less likely to be satisfied with working conditions. In addition, 60% of staff agreed that working a maximum 40 hour working week would improve their experience of working in racing (64% in 2021 and 67% in 2018). 20% disagreed (19% in 2021 and 16% in 2018), with the remainder neutral. Further, 63% of staff agree that their employer allows them to have flexible working patterns to suit their needs.
- **Pay and benefits:** 52% of racing staff are satisfied with their pay and benefits (57% in 2021 and 60% in 2018). Staff that are not satisfied with their job are less likely to be satisfied with pay.
- **Fair and equal treatment:** 76% of racing staff said they receive fair and equal treatment from their employer (74% in 2021 and 81% in 2018). Staff that are not satisfied with their job are less likely to agree they receive fair and equal treatment.
- **Promoting staff wellbeing:** 64% of staff said their employer promotes wellbeing (70% in 2021). Staff that are not satisfied with their job are less likely to say their employer promotes wellbeing.
- **Respecting diversity and promoting inclusion:** 76% of staff agree their employer respects diversity and promotes inclusion (78% in 2021). Staff that are not satisfied with their job are less likely to say their employer respects diversity and promotes inclusion.
- **Bullying and harassment:** 44% of staff said that bullying and harassment is an issue in the industry (42% in 2021). Staff that are not satisfied with their job are more likely to say bullying and harassment are issues. Also, 9% of trainers said they had to deal with bullying and harassment within the last two years and 90% of these said they were at least quite well equipped to deal with it.
- **Life satisfaction:** 63% of racing staff are satisfied with their lives (67% in 2021, 74% in 2018 and 77% in 2016). Staff that are unsatisfied with their job are less likely to be satisfied with life.

Figure 4.4: Staff perceptions of working in the industry



Number of respondents: On average across all statements – 1567.

Questions asked: Overall, how satisfied are you with your job? / Do you agree or disagree with the following statements about your job in racing? / Thinking about training, development and career issues, do you agree or disagree with the following statements? / Overall, how satisfied are you with your life nowadays?

Staff retention indicators are broadly consistent with 2021, which means they have not reversed the negative trend of more staff planning to leave the industry

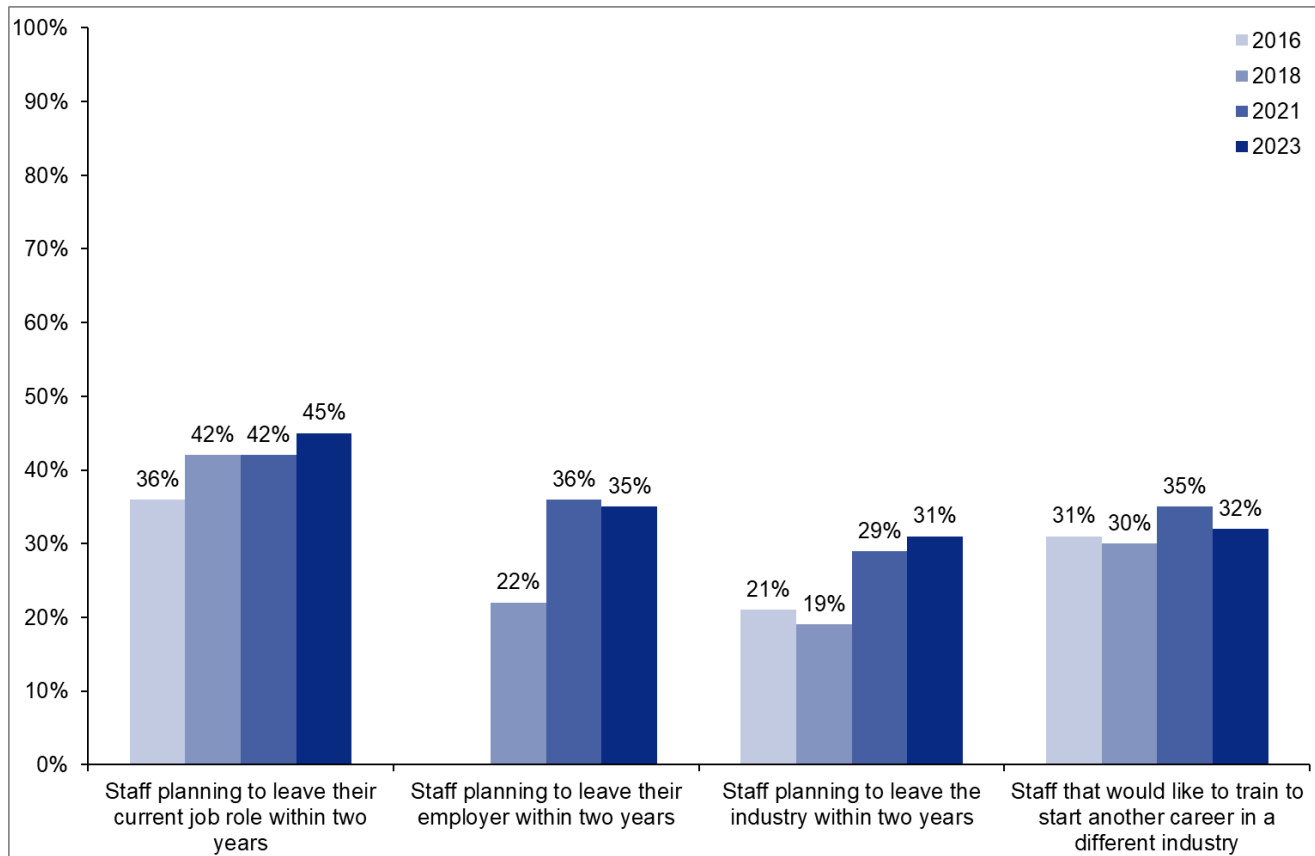
4.14. Staff said the following about retention:

- Plan to leave current job within two years:** 45% of staff plan to leave their current job within two years (42% in 2021 and 2018 and 36% in 2016). Two-thirds of these (66%) intend to leave the industry all together within two years. As in previous surveys, staff that have been working in the industry for 10 years or more (35% of staff) are less likely than other staff to say they plan to leave their current job within two years (38% plan to leave within two years).
- Plan to leave employer within two years:** 35% of staff plan to leave their current employer within two years (36% in 2021 and 22% in 2018). 72% of these plan to leave the industry all together within two years. Staff that have been working in the industry for 10 years or more are less likely than other staff to say they plan to leave their current employer with two years (31%).
- Plan to leave industry within two years:** 31% of staff plan to leave the industry within two years (29% in 2021, 19% in 2018 and 21% in 2016). Staff that are unsatisfied with their job (55% plan to leave industry) are more likely than satisfied staff (17% plan to leave industry) to plan to leave the industry within two years. The reasons staff cited for planning to leave the industry are similar to those cited since 2016 and for lack of job satisfaction – i.e. mainly working conditions and low pay, especially in light of workload, the racing schedule and reduced prize money, which means it can be difficult to find affordable housing and pay household bills, especially with the current cost of living. There was also some mention of lack of career progression opportunities and perceived

poor management.¹² In addition, a small number of staff cited illness/injury, which has worsened with age making it difficult to do a physical job. There was also some mention of the demanding nature of the job (long and unsociable hours) not being conducive to bringing up a young family. A small proportion (under 10% of those that plan to leave within two years) cited old age/retirement.

- **Like to start career in different industry:** 32% of staff would like to start a career in a different industry (35% in 2021, 30% in 2018 and 31% in 2016). As in previous years, this is more common amongst staff that have worked in the industry for three years or more (34% compared with 22% of newer staff) and staff unsatisfied with their job (50% would like to join another industry).

Figure 4.5: Staff perceptions and retention



Number of respondents: On average across all statements – 1571.

Questions asked: How much longer do you intend to be working in your current job role? / How much longer do you intend to be working with your current employer? / How much longer do you intend to carry on working in racing?
Thinking about training, development and career issues, do you agree or disagree with the following statements?

¹² These findings are consistent with the BHA’s research into the reasons for stable staff leaving working in racing yards conducted in 2018.

Section 5: Skills, training and support

Introduction

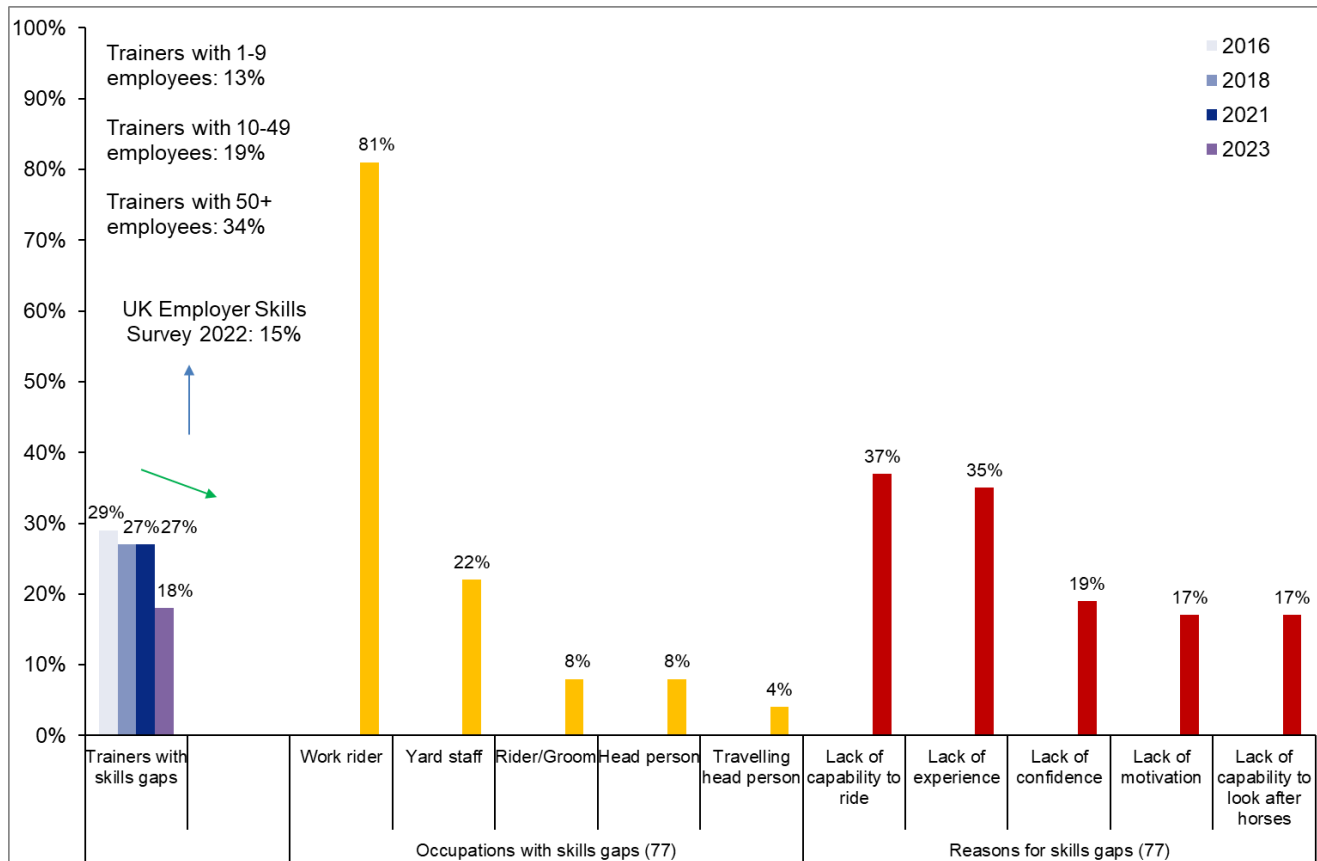
5.1. This section presents findings about skills gaps, training and support from the perspective of trainers and staff.

Skills gaps

Under 1-in-5 trainers now have skills gaps amongst their existing workforce, which is a notable improvement, although gaps still remain especially amongst work riders

- 5.2. 18% of trainers said there are gaps in the skills or capabilities of their existing workforce (27% in 2021 and 2018, and 29% in 2016). This compares to a national figure of 15%, which has remained broadly consistent since 2015 (14% in 2015 / 13% in 2017).
- 5.3. 4% of trainers have a combination of skills gaps, hard-to-fill vacancies and retention difficulties (11% in 2021 and 9% in 2018 and 2016).
- 5.4. As in previous surveys, larger yards are more likely than smaller yards to state they have skills gaps – for example, 13% of yards with 1-9 staff have skills gaps compared with 19% with 10-49 staff and 34% with 50+ staff. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 5.5. The occupations most likely to have skills gaps are work rider (cited by 81% of trainers with skills gaps in 2023, up from 56% in 2021, 76% in 2018 and 49% in 2016), yard staff (22% in 2023, 19% in 2021 and 2018, and 26% in 2016), and rider/groom (8% in 2023, down from 31% in 2021, 24% in 2018 and 40% in 2016).
- 5.6. The main reasons for skills gaps are similar to those in previous years - a lack of capability to ride (cited by 37% in 2023, 52% in 2021, 71% in 2018 and 49% of trainers with skills gaps in 2016) and lack of experience (35% in 2023, 45% in 2021, 36% in 2018 and 42% in 2016). Other skills gaps cited include lack of confidence (19%), lack of motivation (17%), and lack of capability to look after horses (17%).

Figure 5.1: Skills gaps



Number of respondents: 427 trainers / numbers in brackets are the number of respondents to follow-up questions asked only to trainers with skills gaps.

Questions asked: Are there any gaps in the skills or capabilities of your existing workforce i.e. areas where existing staff lack the skills or capabilities to do their jobs as well as possible? / Which specific occupations have skills gaps? / What skills gaps exist?

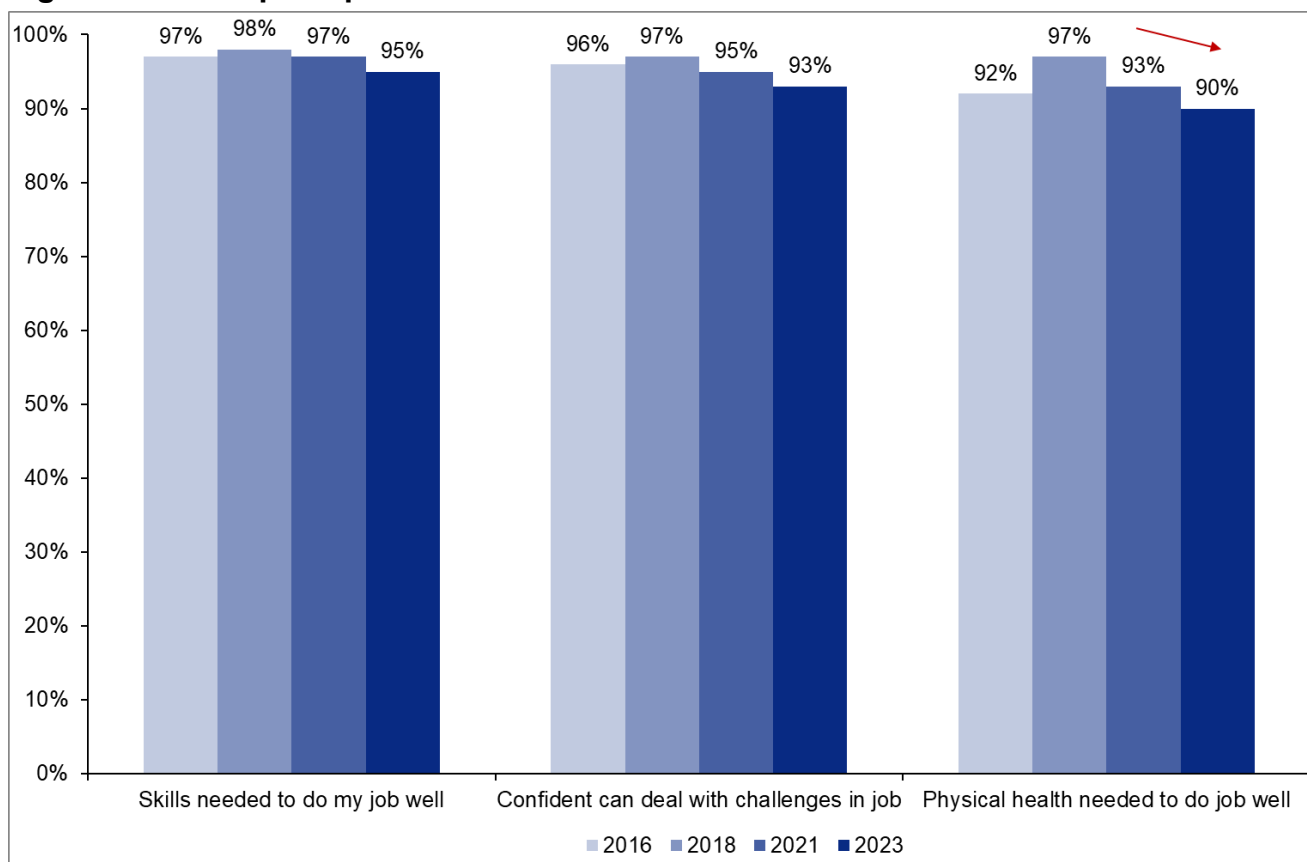
Staff and skills

Most staff continue to state they have the skills, confidence and physical health to do their jobs well, generally consistent with the previous surveys

5.7. The perceptions of staff about their skills are consistent with the previous surveys and perhaps more positive than trainer perceptions:

- 95% said they have the skills they need to do their job well (97% in 2021, 98% in 2018 and 97% in 2016).
- 93% said they are confident they can deal with challenges in their job (95% in 2021, 97% in 2018 and 96% in 2016).
- 90% said they have the physical health they need to do their job well (93% in 2021, 97% in 2018 and 92% in 2016). This represents a statistically significant decrease since 2018, albeit only slightly when compared to other years.

Figure 5.2: Staff perceptions about skills



Number of respondents: On average across all statements – 1562.

Question asked: Do you agree or disagree with the following statements about your job in racing?

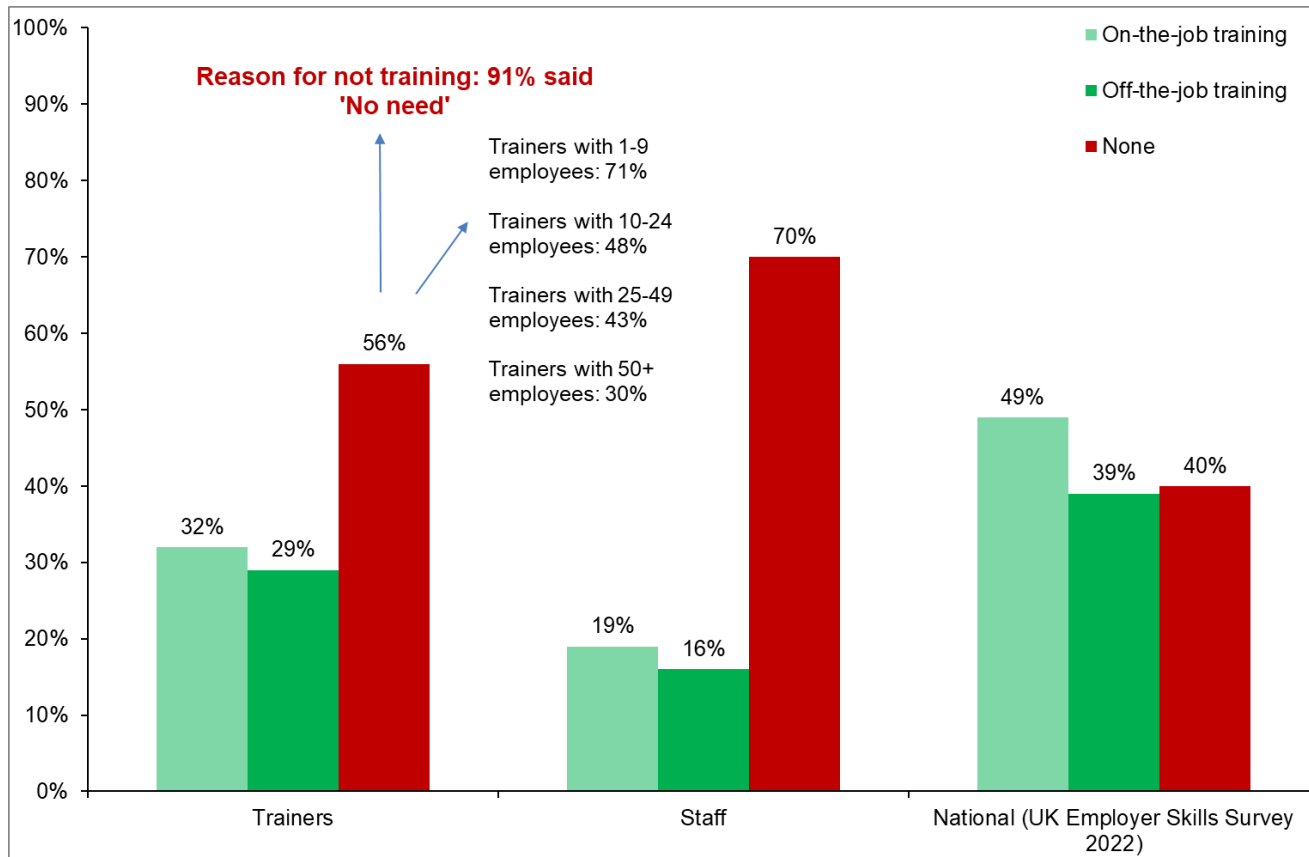
Training and development prevalence

Over half of trainers and over two-thirds of staff do not engage in training and development activities, with prevalence less in smaller yards, and levels have returned close to those in 2016

- 5.8. 56% of trainers have not funded or arranged any training in the past 12 months (47% in 2021, 43% in 2018 and 51% in 2016) and 70% of staff have not taken part in any training or development in the past 12 months (also 70% in 2021, 60% in 2018 and 71% in 2016 – a statistically significant decrease from 2018, but in line with 2016 results) (this is consistent across different demographic groups, although, as in 2018, part-time staff are less likely to receive training – 74% did not receive training compared with 68% of full-time staff). Satisfied staff are also more likely to have received training – 66% did not receive training compared with 78% that are unsatisfied.
- 5.9. These results compare with 40% of businesses nationally that did not fund or arrange training (based on the UK Employer Skills Survey 2022, which has worsened from 34% in previous years).
- 5.10. The types of training undertaken vary, from work rider training, jockey coaching and apprenticeships, to specific skills and subjects such as first aid, horse transport, horsecare, yard management, health and safety, and mental health awareness.
- 5.11. 27% of trainers that said they have skills gaps do not provide training (36% in 2021, 27% in 2018 and 33% in 2016).
- 5.12. As in previous surveys, smaller yards are less likely to train their staff, with 71% of trainers with 1-9 staff not providing training or development in the past 12 months, compared with 48% of trainers with 10-24 staff, 43% with 25-49 staff and 30% with 50+ staff. Similar trends also exist with the number of horses trained and amount of prize money earned.
- 5.13. In addition, as in previous surveys, trainers that report improved business performance are more likely to train their staff - 60% train their staff compared with 37% of other trainers.
- 5.14. As in previous surveys, the main reason cited by employers that do not provide training is that there is 'no need' – cited by 91% of trainers that did not provide training or development in the past 12 months (cited by 82% in 2021 and 88% in 2018). In addition, 6% cited a lack of time, 3% a lack of funds and 1% cited a lack of appropriate training and courses locally.
- 5.15. The main reasons staff cited for not taking part in training are similar to the past - a lack of support or encouragement from their employers and a lack of time (including not being able to attend external training during working hours). In addition, some said they have a lack of interest or need. In the past a lack of awareness of training opportunities was also commonly cited, but this was cited less commonly in 2021 and 2023, although is still a relevant issue.
- 5.16. 48% of trainers said they do not expect to fund or arrange training or development in the next 12 months (41% in 2021, 44% in 2018 and 47% in 2016). 84% of employers that did not provide training in the past 12 months said this (70% in 2021, 84% in 2018 and 83% in 2016). This means that overall approximately 48% of trainers have not provided training/development in the past 12 months or will not provide training in the next 12 months (32% in 2021, 37% in 2018). The reasons for not providing training in the next 12 months are almost identical to the reasons for not having provided it in the past, with 94% citing 'no need' and 5% too expensive/do not have funds.
- 5.17. Staff were asked about the type of training and development they would like in the future. Similar to the past, about a quarter mentioned development opportunities that would help them progress their career and improve their capabilities, such as management and/or leadership training, racing secretary training, support to become a trainer, training to become a head person, equine management/science, horsecare, health and safety, yard management, and getting a HGV licence and horse transport. Just over a tenth said they

wanted jockey or rider coaching and help to improve their work rider skills. About a tenth said they wanted opportunities to develop basic skills such as IT, maths and languages, as well as finance and accountancy. Lastly, new in 2021 and mentioned again in 2023, about a tenth mentioned training around more human orientated aspects, such as mental wellbeing/first aider training, being mentored themselves or training to become a mentor of staff, or training around managing staff effectively.

Figure 5.3: Training and development prevalence



Number of respondents: 427 trainers / 1581 staff.

Note: Respondents could select both on-the-job and off-the-job training response options.

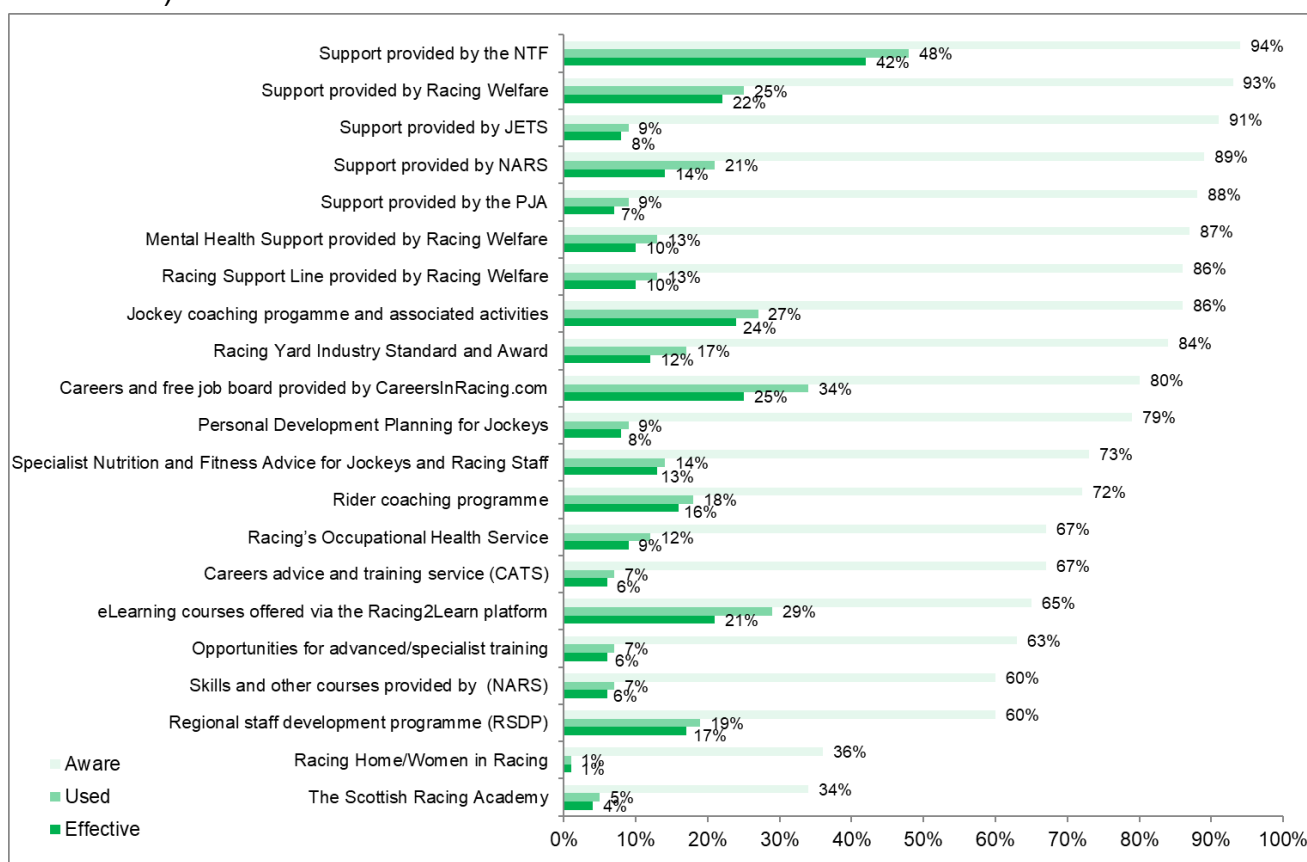
Questions asked: Over the past 12 months have you funded or arranged any off-the-job training or development or on-the-job or informal training or development for your staff? / Why have you not funded or arranged any training or development for staff? / In the last 12 months, have you taken part in any on or off the job training or development?

Awareness and use of training and support initiatives

Most trainers remain aware of the training and development initiatives in the industry, and notable numbers are finding them helpful, although levels of awareness and use are slightly down on previous years

- 5.18. Most trainers are aware of the training and support initiatives in the industry. For example, on average across all initiatives, 74% of trainers are aware (80% in 2021 and 2018, and 68% aware in 2016) (although the list of initiatives has been added to/amended each time, so not directly comparable).
- 5.19. On average, 18% of trainers have used at least one of the initiatives (26% in 2021, 30% in 2018 and 15% in 2016). And 15% on average have found the initiatives helpful (22% in 2021). This equates to 83% of those that use the initiatives stating they are helpful (85% in 2021).
- 5.20. As in previous surveys, smaller yards are less likely to be aware of, or have used, the initiatives (which may simply be a result of having fewer staff and therefore less need/opportunity), although the differential is reducing. For example, on average across all the initiatives, 72% of trainers with 1-9 employees were aware of the initiatives (78% in 2021) and 10% have used the initiatives (18% in 2021) compared with 75% of trainers with 10+ employees that are aware of the initiatives (84% in 2021) and 22% that have used them (37% in 2021).
- 5.21. 93% of Scottish-based trainers in this survey were aware of the Scottish Racing Academy, and 78% had used/engaged the organisation.

Figure 5.4: Awareness and use of training and support initiatives (trainers) (ordered by awareness)



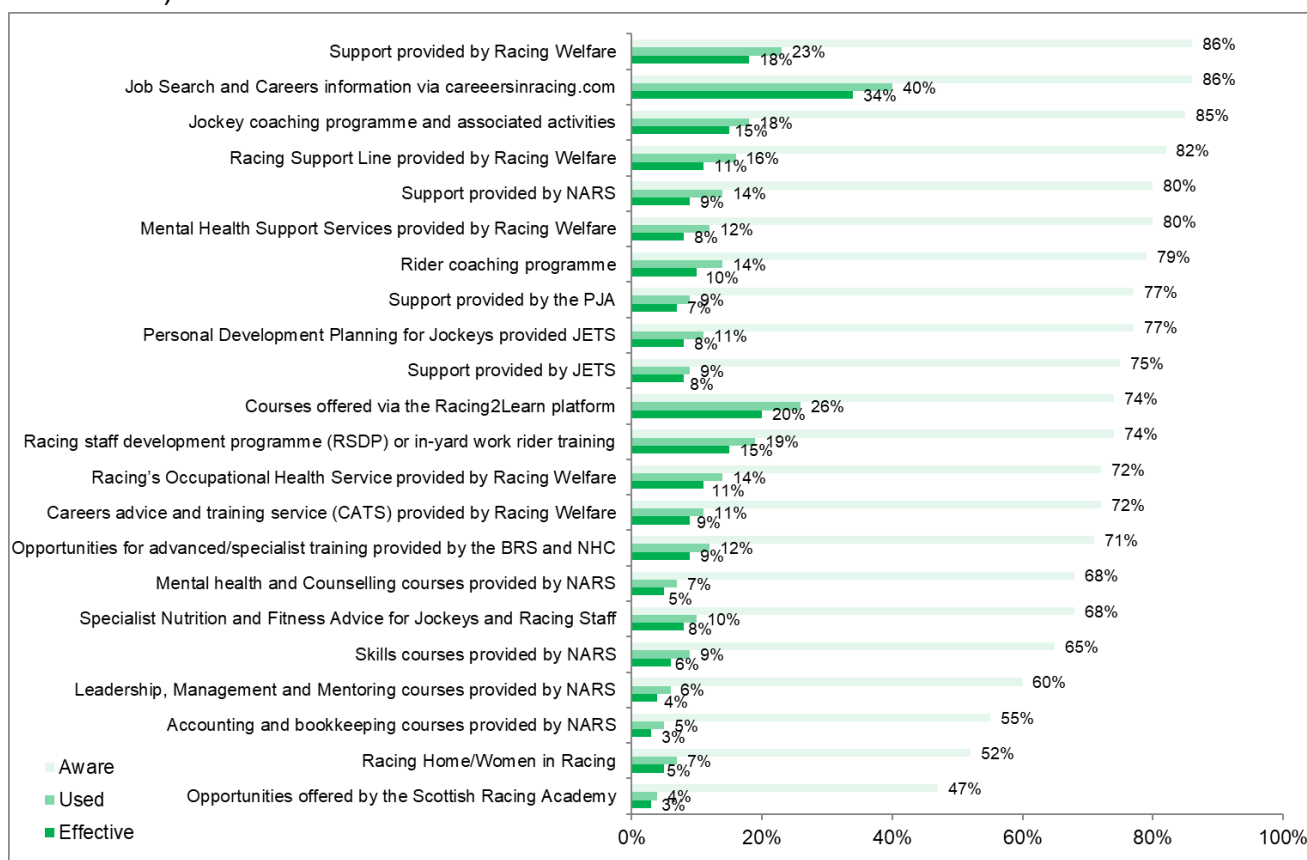
Number of respondents: 427. Percentages are of all respondents.

Questions asked: Are you aware or have you as an employer used or supported your staff to use any of the following industry recruitment, training and retention initiatives?

Most staff continue to be aware of the training and support initiatives in the industry, although only a minority are using them

- 5.22. The majority of staff are aware of the training and support initiatives in the industry. For example, on average across all initiatives, 72% of staff are aware of the training and support initiatives (73% in 2021, 77% in 2018 and 74% in 2016) (although the list of initiatives has been added to/amended over time, so results are not directly comparable).
- 5.23. An increasing number of staff have used the training and support initiatives, although these figures remain low. For example, on average across all initiatives, 13% of staff have used the training and support initiatives (12% in 2021, 11% in 2018 and 6% in 2016), with 10% of all staff on average stating they were helpful (9% in 2021) or 77% of those that used the services.

Figure 5.5: Awareness and use of training and support initiatives (staff) (ordered by awareness)



Number of respondents: On average across all statements – 1563. Percentages are of all respondents.

Questions asked: Are you aware or have you used any of the following training, development or career support/services?

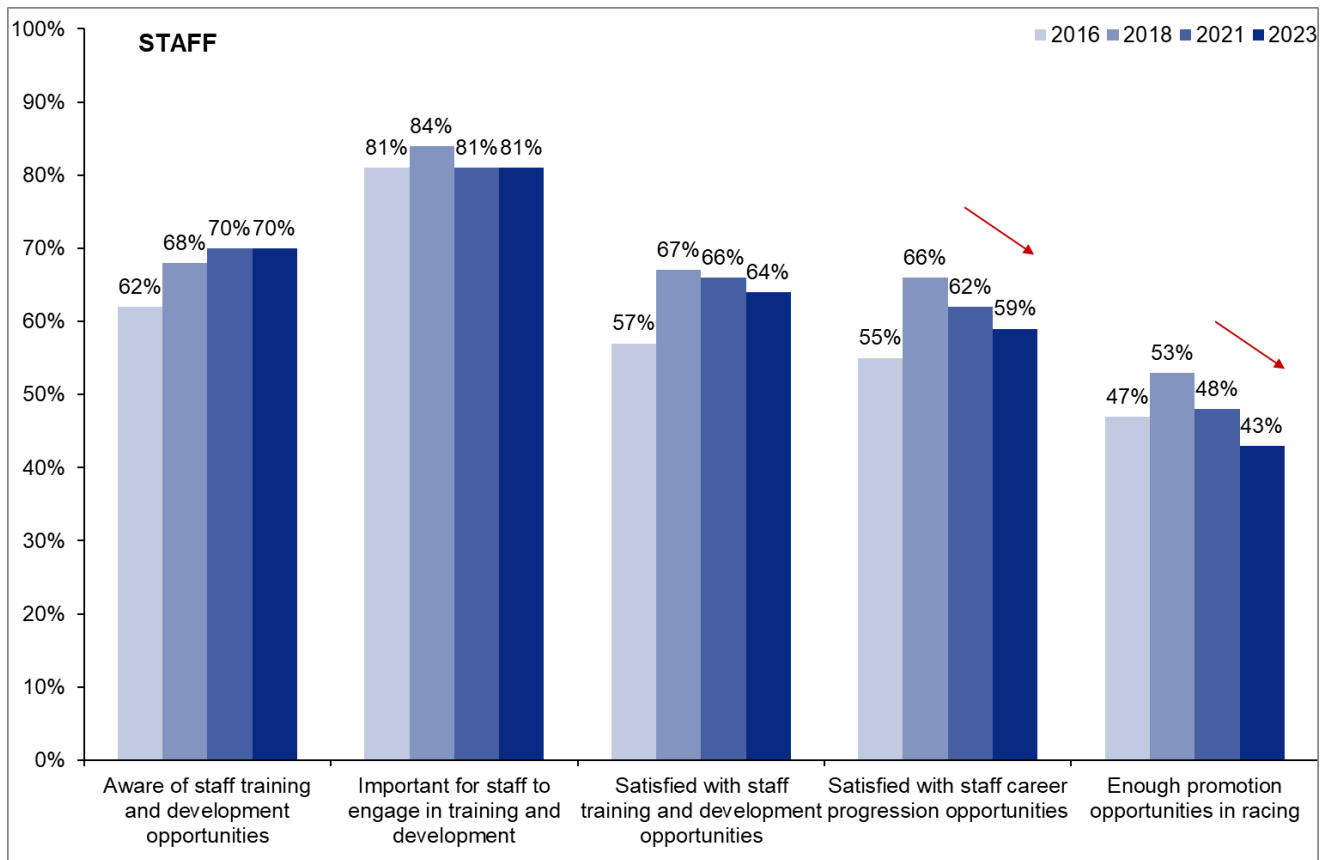
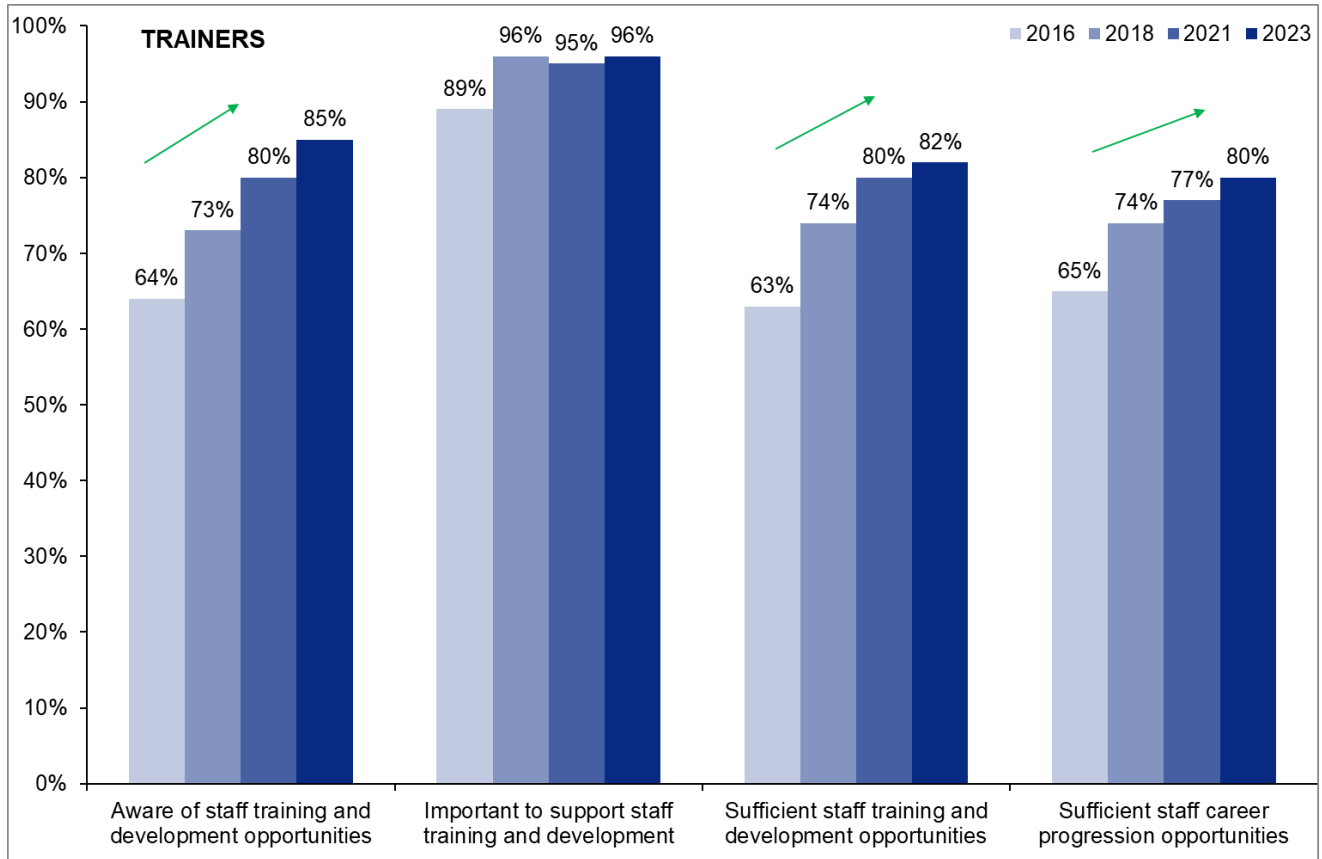
Note:

Perceptions and attitudes about training and development

There is continued growth with some indicators relating to trainers' attitudes about training and development opportunities, although staff are less positive and there is an emerging downward trend amongst staff about career progression and promotion opportunities

- 5.24. Trainers and staff hold the following perceptions and attitudes about training and development, which generally maintain the improvement since 2016 and increase it for some indicators relating to trainers. However, there is an emerging downward trend amongst staff relating to career progression and promotion opportunities:
- 85% of trainers (80% in 2021, 73% in 2018 and 64% in 2016) and 70% of staff (also 70% in 2021, 68% in 2018 and 62% in 2016) are aware of staff training and development opportunities.
 - 96% of trainers (95% in 2021, 96% in 2018 and 89% in 2016) and 81% of staff (also 81% in 2021, 84% in 2018 and 81% in 2016) agree it is important for staff to engage in training and development.
 - 82% of trainers (80% in 2021, 74% in 2018 and 63% in 2016) and 64% of staff (66% in 2021, 67% in 2018 and 57% in 2016) are satisfied with staff training and development opportunities.
 - 80% of trainers (77% in 2021, 74% in 2018 and 65% in 2016) and 59% of staff (62% in 2021, 66% in 2018 and 55% in 2016) are satisfied with staff career progression opportunities.
 - 43% of staff agree there are enough promotion opportunities in racing (48% in 2021, 53% in 2018 and 47% in 2016).
- 5.25. There is generally similar results across different sizes of yards, albeit with some minor variation from indicator to indicator.
- 5.26. As with previous years, staff that intend to leave the industry within the next two years (and also staff that are unsatisfied with their job) are less likely to be aware of training opportunities, to be satisfied with staff training and development opportunities as well as career progression opportunities, and are less likely to agree there are enough promotion opportunities in racing. This suggests perceptions around training and development impact on job satisfaction and staff retention and remain important issues for the industry.

Figure 5.6: Perceptions and attitudes about training and development



Number of respondents: 427 trainers / 1571 staff (average across indicators).

Questions asked: Do you agree or disagree with the following statements about personal and professional development opportunities for staff? / Thinking about training, development and career issues, do you agree or disagree with the following statements?

Section 6: Concluding points

Introduction

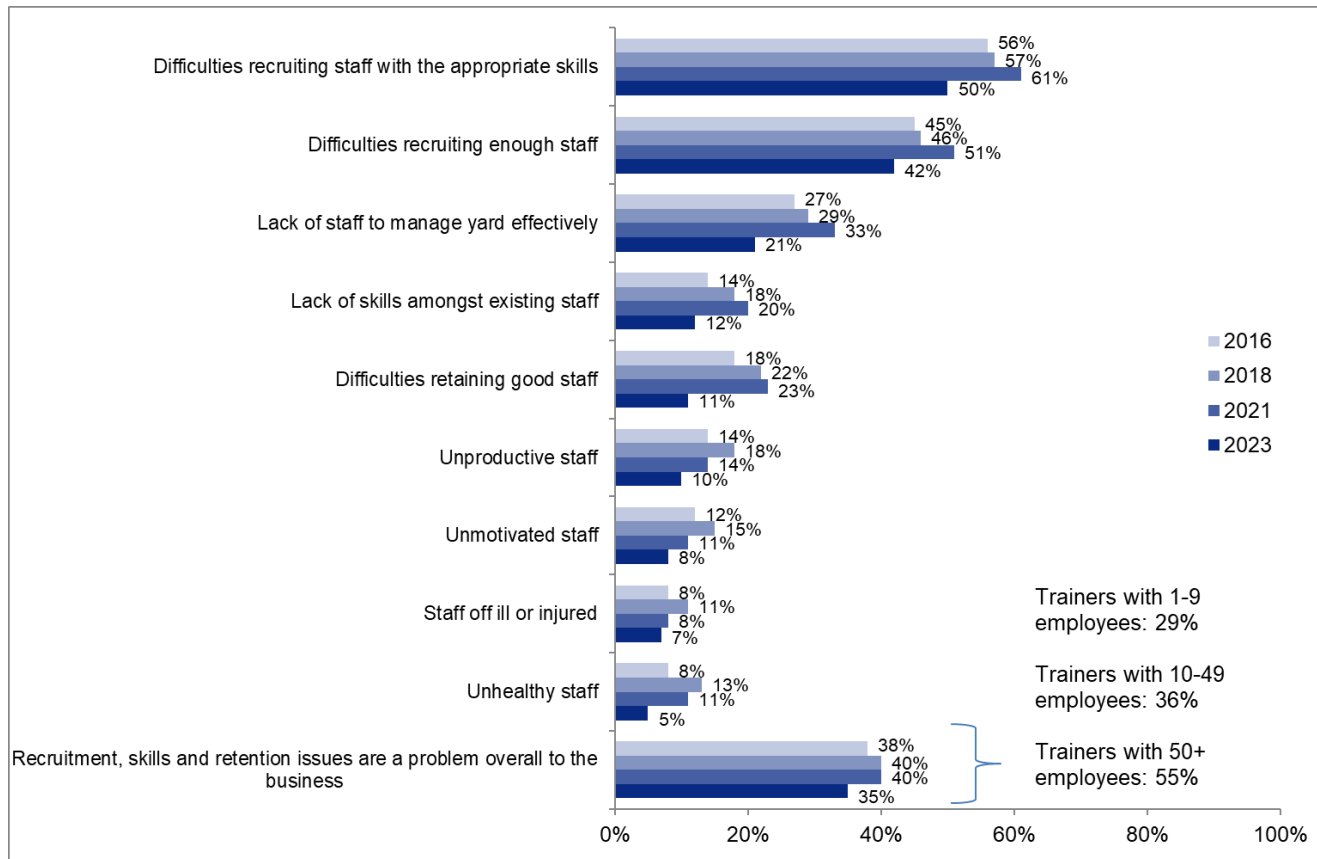
- 6.1. By way of conclusion, this section presents findings about the overall perceptions and size of recruitment, skills and retention problems as perceived by trainers.
- 6.2. In addition, it presents whether trainers and staff perceive there to be improvements in recruitment, training and retention within the industry over recent years.

Perceptions about key recruitment, skills and retention issues

Recruitment, skills and retention issues are slightly less problematic, although issues still remain for over a third of businesses especially around recruitment of sufficient numbers of staff and with the appropriate skills

- 6.3. As in previous surveys, the two most cited recruitment, skills and retention problems are difficulties recruiting staff with the appropriate skills (50% of trainers said this is a problem in 2023, 61% in 2021, 57% in 2018 and 56% in 2016) and difficulties recruiting enough staff (42% said this is a problem in 2023, 51% in 2021 46% in 2018 and 45% in 2016). This said, these indicators are showing positive downward trends, along with other key indicators such as lack of skills amongst existing staff (12% down from 20% in 2021) and difficulties retaining good staff (11% down from 23% in 2021).
- 6.4. This said, there are still notable numbers of trainers that rate these issues as problems and consequently state that these issues are having an adverse impact on some yards, with 21% of trainers stating that a lack of staff to manage a yard effectively is a problem (33% in 2021, 29% in 2018 and 27% in 2016).
- 6.5. The above positive changes are reflected in an improvement in the overall rating with 35% of trainers (40% in 2021 and 2018, and 38% in 2016) stating that recruitment, skills and retention issues are a problem to their business (essentially when placed in the context of other issues). As has been the case throughout this research (and in previous surveys), these issues are a bigger problem for larger yards. For example, 29% of trainers with 1-9 staff said recruitment, skills and retention issues are a problem (33% in 2021), compared with 36% of trainers with 10-49 employees (51% in 2021) and 55% with 50+ staff (50% in 2021).
- 6.6. In addition:
 - 7% said they have problems retaining working mothers (14% in 2021).
 - 6% said there are difficulties faced by female staff returning from maternity leave (11% in 2021).
 - 39% said there is a problem with a lack of UK workers to meet their requirements (41% in 2021).
 - 21% said there is a problem with a lack of overseas staff to meet their requirements (39% in 2021).

Figure 6.1: Recruitment, skills and retention problems



Number of respondents: 427 trainers.

Questions asked: Thinking about your business, in general how big a problem are the following issues for your business? / Overall, in general, how big a problem are recruitment, skills and retention issues to your business?

Perceptions of change over time

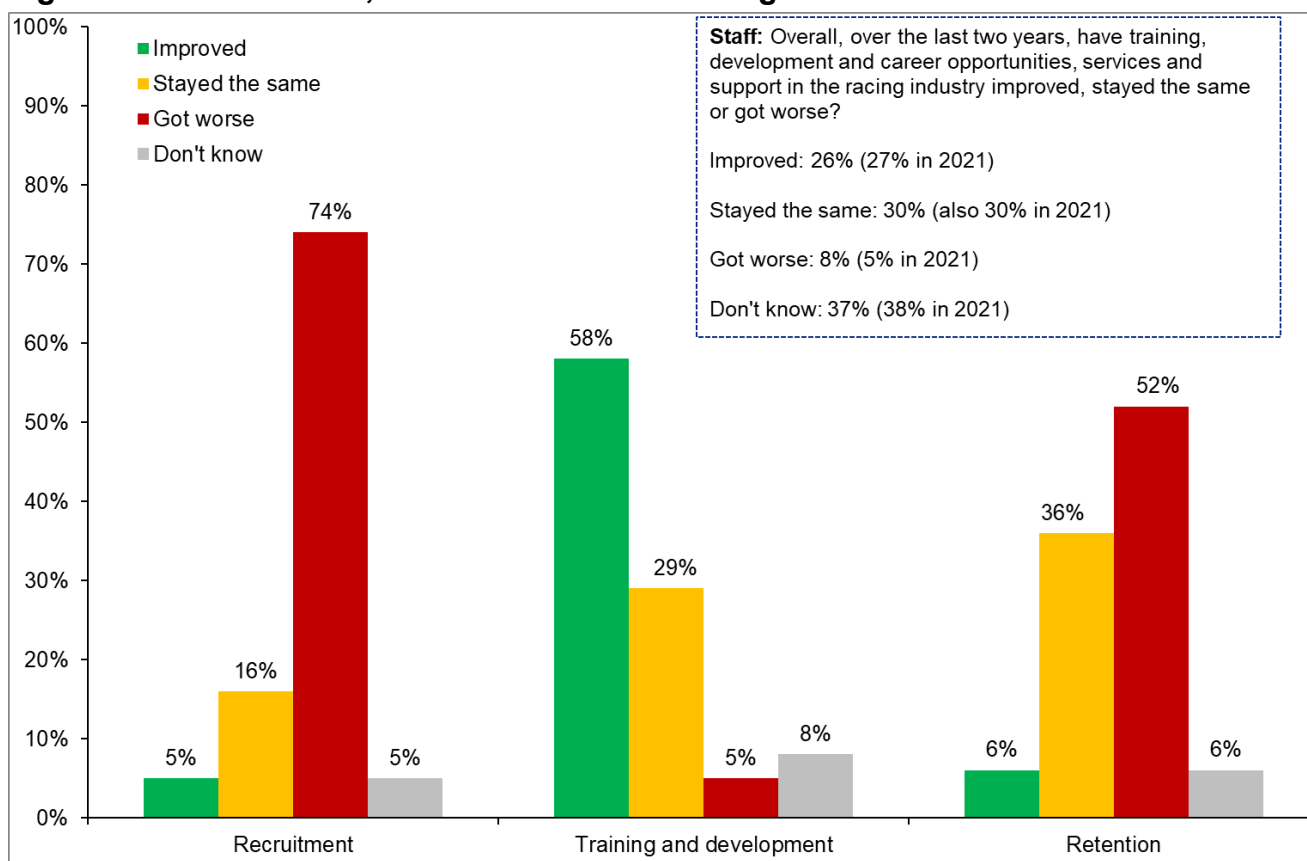
The majority of trainers continue to state that training and development for staff has improved in the last two years, but that recruitment and retention has worsened or stayed the same, with staff more balanced in perception

6.7. Trainers said the following about change over time:

- 74% said recruitment has got worse (63% in 2021 and 2018), 16% said it has stayed the same (28% in 2021 and 26% in 2018) and 5% said it has improved (4% in 2021 and 6% in 2018).
- 58% said that training and development improved (57% in 2021 and 68% in 2018), 29% stayed the same (30% in 2021 and 22% in 2018) and 5% got worse (also 5% in 2021 and 3% in 2018).
- 52% said retention has got worse (42% in 2021 and 2018), 36% stayed the same (43% in 2021 and 42% in 2018) and 6% improved (8% in 2021 and 11% in 2018).

6.8. In addition, 26% of racing staff said that training, development and career opportunities, services and support improved (27% in 2021 and 32% in 2018), 30% stayed the same (also 30% in 2021 and 26% in 2018) and 8% got worse (5% in 2021 and 2018). The remainder (37%) said 'don't know' (38% in 2021), which reflects perhaps lack of awareness and engagement in training and development opportunities.

Figure 6.2: Recruitment, skills and retention changes over time



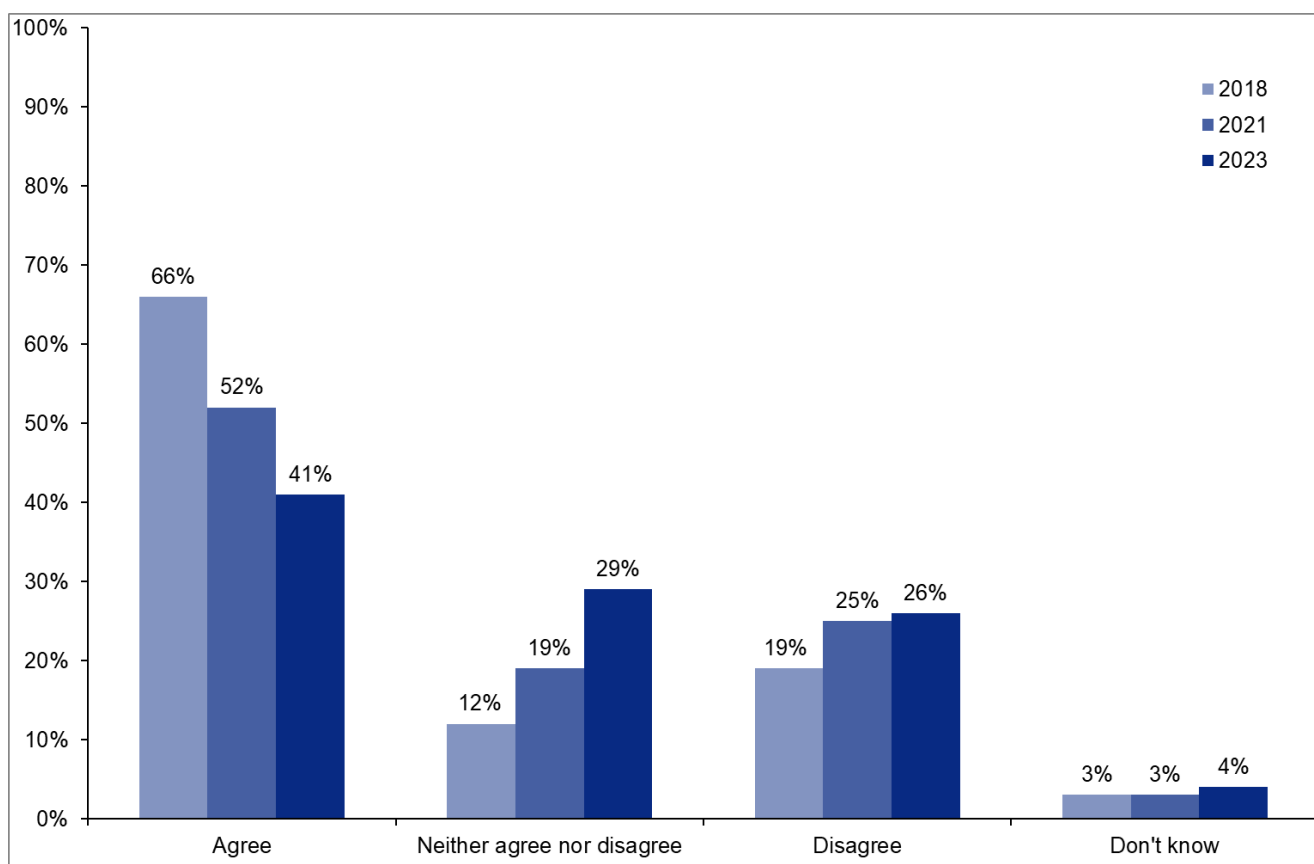
Number of respondents: 427 trainers / 1571 staff.

Questions asked: Overall, over the last two years, have the following in the industry improved, stayed the same or got worse?

Two-fifths of trainers agree the industry is working effectively together to address staffing issues, while a quarter disagree

- 6.9. 41% of trainers said that the industry is working together effectively to address recruitment, training and retention issues (52% in 2021 and 66% in 2018), while 25% disagree with this (25% in 2021 and 19% in 2018).
- 6.10. These results are a little at odds with other results in the survey, which suggest a slight positive trend, especially around retention and skills. On reviewing the results further, including open-ended comments, some trainers said they are resolving staffing challenges themselves through their own recruitment, training and staff welfare rather than this coming via the industry. In addition, some used this question to vent at related issues such as concerns over limited prize money and the increased (Sunday/nighttime) race schedule. Moreover, these results perhaps reflect continued concerns around recruitment of skilled staff into the industry, as much as they do around other staffing issues such as skills, training and retention.

Figure 6.3: Industry working effectively together to improve recruitment, training and retention



Number of respondents: 427 trainers.

Question asked: Do you agree or disagree, that the industry is working effectively to improve recruitment, training and retention in the industry?

Public Perspectives Ltd
20 Camp View Road
St. Albans, AL1 5LL

Tel: 01727 750175

E-mail: mark@publicperspectives.co.uk

Website: www.publicperspectives.co.uk

Registered in England and Wales Company No: 6769064

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